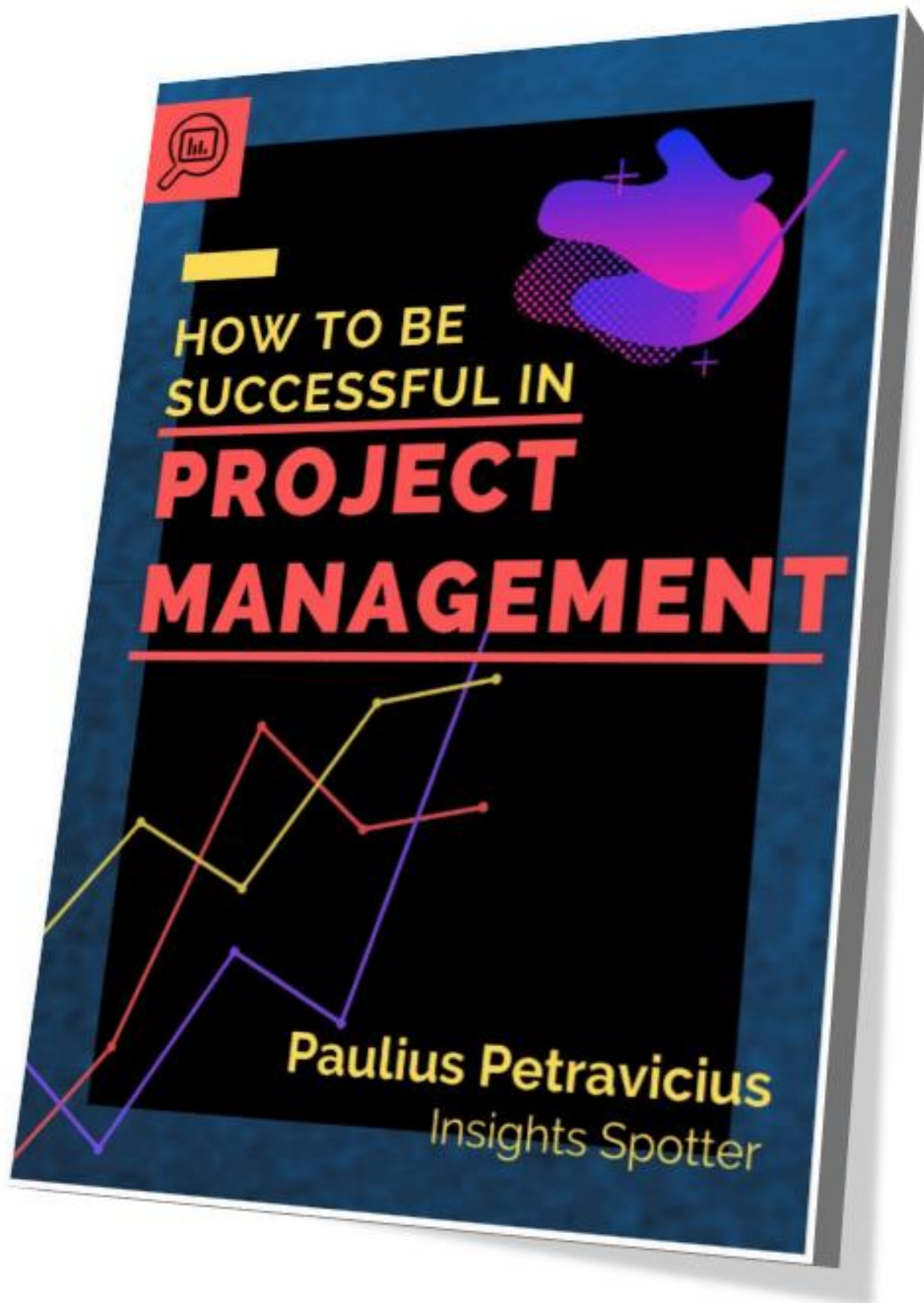




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How to be Successful in Project Management

Your Guide to Running Projects and Avoiding Pitfalls

Introduction

If you are reading this eBook, you must be interested in project management; learning what it is made from or just having everything in one place as a reminder. Well, I have great news for you! You are in the right place! There is always a long and a short way to answer the question “How to be successful in project management? Let’s start with the short version first.

To be successful in project management you will need to have:

- 1. great soft skills: to manage stakeholders**
- 2. solid hard skills: to know-how project process works; how to do the planning, other tasks**
- 3. domain knowledge or industry-specific knowledge: In my cases, this is Asset Management and Banking**

Then you would use your skills to create strong project management base in project initiation and planning stages by defining a clear scope, budgets, time and quality. If your base is strong you will have a smooth execution where you distribute work to a team and monitor progress. If preparation had gaps then you will have more ad-hoc adjustments to do. Finally, you will work with the team to learn from mistakes and successes. Then, you will become even more successful next time.

What Should You Expect from the eBook?

As the name suggests, this is a guide to project management. I follow best practices of various training bodies, thought leaders, and put a little spin on what makes sense to do in reality, when it comes to project management based on my own experience. This guide should help everyone to understand what project management is, start applying to their projects and even prepare for future interviews. We will dive into the soft and hard skills of the project manager and different states of the project lifecycle. It will also prepare you to run a project in any industry.

Application Analogy

If you can drive a car, my analogy will make sense. When you are learning how to drive a car, you must follow all rules to check all the boxes to get your licence. Yet, when you get it, you adjust to real life, your city and what makes sense within the rules

and regulation of the law. This guide is similar; I will present theory and add some helpful pro tips based on real life.

Why the Guide?

The reason I have built this guide is that I wanted to have everything I have learned so far in one place to be as a reminder, a guide or a checklist to avoid mistakes and give proper considerations. Since I found this guide useful myself I would like to share it with everyone working in the project world to help them save time, money and nerves.

Also, I have structured everything in an easy and straightforward format for everyone to be able to find the bit they want to learn about by navigating the table of contents.

I think I have successfully managed to combine everything necessary into a short eBook length for everyone to use.

So, shall we dive into what is this world of Project Management and learn how to become a more well-rounded project professional?

About Me

If you would like to learn more about me, check out my website and [about me](#) section at the end of the eBook that tells about why I am in project management and what is my experience.



What is Project Management?

Here we go!

Project Management is simpler than you think. Most people do parts of it in their daily lives, like organising weddings or building houses. Though, in a corporation, things need to be a bit more formal for various reasons like accountability, the integrity of the whole organisation or continuity. Therefore, we have multiple project management frameworks, like Agile, Waterfall and tools, like JIRA, MS Project, to name a few in existence.

Let's start with essence; Project Management is about getting things done. Sounds simple enough, right!? Yet, to get those things done, we need to apply processes, methods, skills, knowledge and experience mostly because we need to make sure that we are achieving agreed project objectives in line with the project acceptance criteria and agreed parameters. Thus, we ensure that a business believes a project is successful and not just us.

You see, the project manager has deliverables to provide at the end, which he/she agreed to produce within timescale and budget at the beginning of the project. Business often needs to account for all considerable expenses to investors or

shareholders. Therefore, at times, the project manager can feel a lot of pressure from different people in the organisation. Thus, you need to be ready to have excellent soft skills to manage all individuals who try to apply this pressure.

Project Conductor Analogy

A project manager is one individual, who has a high-level perspective of the whole project and knows when things should be happening and who should be doing them. I see him or her as a conductor of the project because this person is managing multiple talented individuals, and a combination of their skills create the final product, which hopefully if you are fortunate enough is a masterpiece.

Project Manager Vs General Manager

You may ask, what is the difference between a project manager and just a usual manager? Well, both manage timescales, budget and people. Only the project manager works within a project, which is a finite timespan endeavour with defined deliverables. Often project outcome is a one-off item.

In contrast, the general manager usually looks after one or multiple business units or operations for an unspecified period. The units produce the same deliverables on a regular basis.

Because of these crucial differences and the fact that each project is a bit different project professionals need a multitude of skills. They may vary in detail. For instance, you may need specific technical skills to run an Agile project or domain skills to work with asset management projects. Yet, all project managers must have peoples' management skills (i.e. stakeholder management) or have excellent business commercial awareness.

Why are Organisations using Project Management?

All organisations have finite resources of capital and people. Plus, companies need to be competitive in the market and produce high-quality goods to generate profits. Project management frameworks are perfect for addressing these goals.

Project is a finite endeavour with clear deliverables and specified budget. And, there is a level of risk management in every project. Thus, the project allows you to have a higher level of control of your resources and results at the end.

As a result, organisations frequently use project management to release a new product, test new ideas or improve existing systems or processes. It is the clarity of knowing "What", "Why", "When", "How", "Where" and "Who" that gives comfort and understanding. Often, "business as usual" ("BAU") operations cannot offer such convenience due to daily commitments and lack of overarching management of the whole initiative from start to end.



Defining What a Project is

You may not even be called a project manager and still have to work on a project and manage it. So, you need to understand if the piece of work can be called project and whether you should start looking into some management frameworks to make this a success. There are five criteria that every single project need to meet:

1. A clear and distinct piece of work, which is different from BAU.
2. All projects are slightly different, even, if from outside they look the same.
3. Projects have a starting and ending point.
4. The final result at the end (e.g. created website; assembled new bike).
5. Clear objective (e.g. increasing sales; producing a product).

If you would like to read more about the project characteristics with some real life examples, have a look into my blog post "[What Is Project?](#)"



Project Success Criteria or Triple Constraint

Every single project has three constraints that affect and dictate the success of a project.

- **Scope:** Project team completes all items in the agreed scope.

- **Time:** Project finishes within an agreed timescale.
- **Budget:** Project completes all work within the allocated budget.
- **Quality:** All three affect the quality of the outcome.

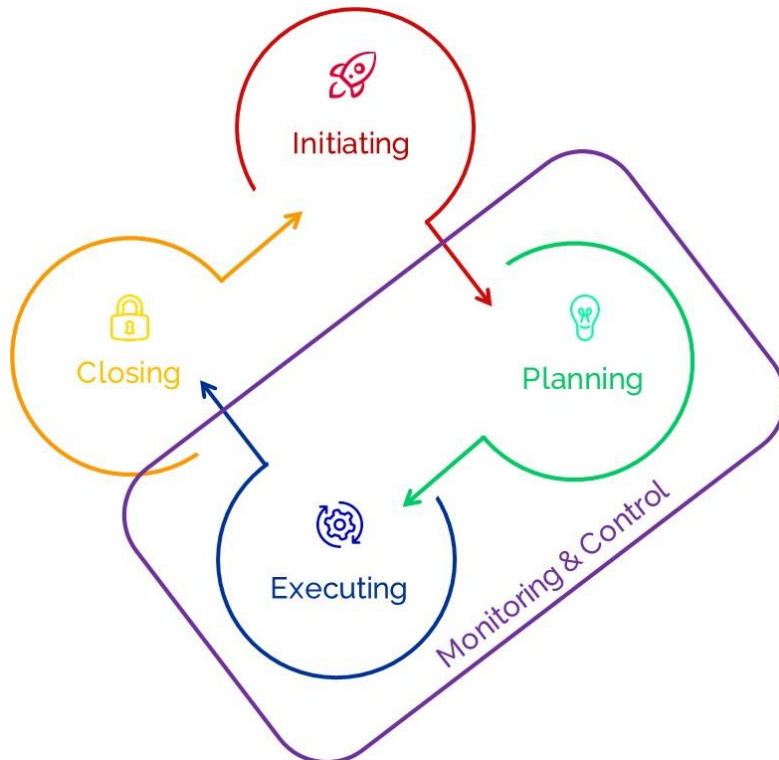
All four are interlinked if you try to change one the other will have to give. Say you have less time, therefore, you may need to hire more people and increase costs. You could also decrease quality in the middle.

A big part of the project manager job is managing expectations concerning these four items. If any component has to change, usually, the manager needs to inform various stakeholders and get their approval before continuing, but more about that later in the text.



The Project Lifecycle

There are several depictions of the project lifecycle; I will illustrate the simple one provided by the Project Management Institute (PMI):



Often, there is one more stage before the initiation stage, where a business decides that project is needed, and a sponsor argues the initial business case. If approved and business benefits are clear, we move into the project world and start looking at how to achieve defined objectives.

Initiating



As the title suggests, you will be working on various initiation steps to start things rolling. The aim is to define the project, develop a high-level business case, and get it approved. Project Manager undertakes several tasks to increase the clarity of the whole project and scope.

- Create a project charter (if one does not exist)
- Perform a feasibility study
- Identify key stakeholders and identify expectations
- Select project management tools
- Get to know the team or select one
- Produce Statement of Work

By the end of the phase, the project manager should be able to communicate the project purpose, scope, goals, requirements, and risks.

Planning



At this stage, project managers roll up their sleeves and start working on the roadmap. Thus, the team will be able to follow the defined steps to execute the project.

The plan aims to achieve goals set in the initiation stage and to specify business requirements. The project manager will work on the following tasks in this phase:

- task planning
- develop a resource plan, which is linked with the project plan
- define goals, critical success factors and key performance indicators ("KPIs")
- communicate roles and responsibilities to team members
- risk Mitigation plans
- define Project Governance
- create a project management plan

You need all these plans for your kick-off meeting with stakeholders, where you will communicate these messages. It will give them confidence that you know what you are doing and have a clear direction.

Executing



Now, that you have done your planning, agreed on your goals and decided on various other parameters—time to put plans into actions. Your team is working very hard now to execute the plan (for example building a software, changing a process or implementing anything else project needs). Also, you will implement any corrections to the original plan as the project unfolds.

I will explore the aspects of leading, working in a team and communicating effectively later in the eBook.

Controlling & Monitoring



You have your plan, and execution is underway, thus, it is time to see if you are going in the right direction by continuously comparing results against the plan. If deliverables start to deviate from agreed project parameters, you will need to course-correct.

If not possible, you will need to go through change control processes set in the project, whether this is via a Steering Committee ("SteerCo") or another forum. Then you will need to update the project plan and all that it entails, such as scope or budget. This phase also includes all the approvals you will need to get for deviations from the plan.

Closing



In the final stage of the project, the business formally accepts all deliverables. You or the project team completes all outstanding tasks, such as invoicing or reviews. It is essential to organise "lessons learned" sessions and share results with the wider business. You will include the results of the whole project and "lessons learned" in the closure documents, and project evaluation reports.

I will expand on each of the project life cycle stages in the next few chapters.

Project Initiating Process



Congratulations, you have been assigned a project. It is a great opportunity and could be quite challenging, but if you prepare thoroughly and plan, there should be fewer issues popping around.

Now, you should start creating a project charter if one does not exist already. Sometimes one may be produced while business was pitching the idea to senior management for funding.

On the other hand, your project may have a commercial contract if business brings the project team from outside. Thus, multiple elements from the charter will be covered there. For instance, it could be that an external IT company is hired to implement specific software, and you have clear objectives embedded in the contract.

Project Charter

So what is this project charter? It is a formal document, typically short and describes the whole project and how the project team needs to carry it out. In most cases Project Charter includes the following:

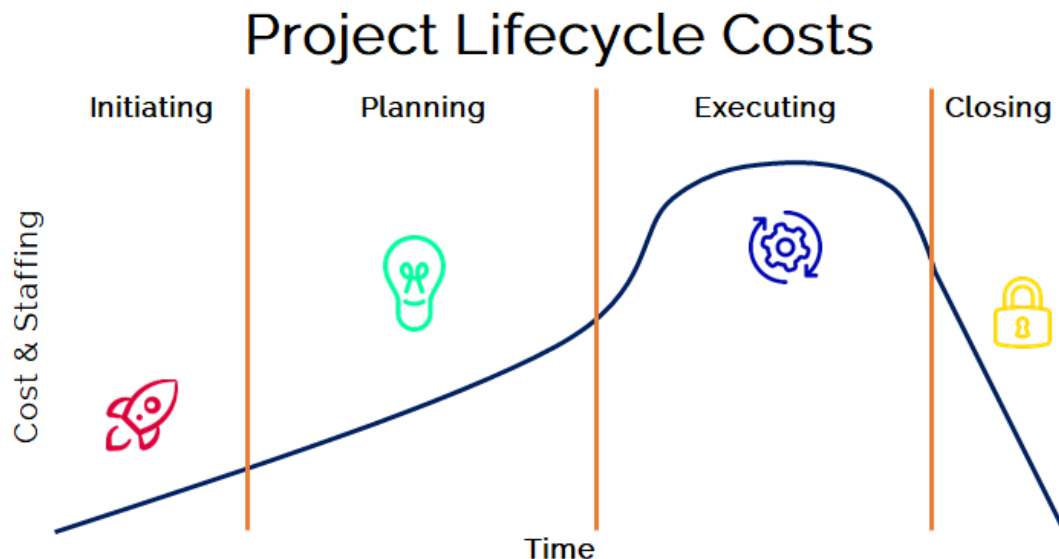
- reasons for the project,
- objectives and constraints of the project,
- who the main stakeholders are,
- risk identified,
- benefits of the project,
- a general overview of the budget,
- sponsor Requirements,
- critical Success Factors (if available),
- project budget & spending authority,
- roles of the project manager & team members.

Also, the document gives the authority to the project manager to use resources and make decisions within the scope of the project.

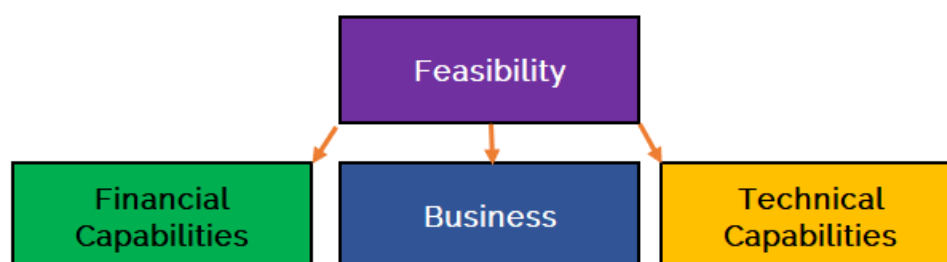
Perform a Feasibility Study

So, you need money, authority and resources to execute the project. Probably the CEO or COO of the organisation will make the allocation. Regardless of who they are, they will want to know that before they put in thousands or even millions of dollars (pounds, euros), the project has a chance to be successful.

Usually, you will complete the feasibility study in the initiation stage before any planning starts. Early stages require fewer resources, and you want to know that the project will succeed before you move any further and allocate more substantial funds. It is one of the essential documents identifying if the project should continue.



Well, what is in the document? If this is a new product, you will be identifying the market; show main goals; potential risks and offer some alternative options. Furthermore, the document should take into account high-level cost like labour and capital investment needed and do initial benefits vs cost analysis. So, when presented, it is clear if the project will increase the wealth of the business. It is helpful to think about feasibility from three perspectives:



1. Financial
2. Business
3. Technical

Note, the project manager may not be the one doing the actual work, but he or she may use it in other documents like business case.

Identify Key Stakeholders and Identify Expectations

Stakeholders are individuals or even organisations, who have an interest in the success of the project. When identifying individuals, we usually start with:

- Customers,
- Users,
- Sponsors,
- Executives,
- Project team,
- Project Managers.

They are usually affected by the outcome and hold various levels of power and influence over the project. Therefore, it is paramount to practice excellent stakeholder management because you need to know how much time and efforts to allocate to various stakeholders. You cannot, and you should not treat all stakeholders in the same way.

Ultimately, organisations are people, and you need support from a portion of critical stakeholders to deliver a project. If you would like to read more about stakeholder management and how to apply it in real life, read my blog post "[Stakeholder Management For Personal Success.](#)"

Select Project Management Tools

There are loads of different tools available in the market to manage projects. Choosing appropriate tools is very important as you have to oversee the whole project, and tools need to enable you to do so. Thus, the bundle of your tools should allow you to record both high-level and medium-level views of what action needs to happen when they need to happen and who is doing them.

When you set up your project, you need to make sure it is easy for you to use these tools so you are not wasting time on unnecessary admin tasks and can concentrate on what gives value instead. I do not have a definitive list, but a few tools that I have been using are:

- MS Visio for process maps and Gantt Charts
- MS Project for a more extensive project resource management and Gantt Charts
- MS Excel Gantt Charts and WBS for smaller projects
- MS Word for SOPs, TOMs and other documents
- MS Teams to collaborate with teams and share drafted documents
- MS PowerPoint to present plans, do scorecards
- JIRA for managing Agile projects and organising sprints
- Confluence for storing final documents and building business cases and analysis.

The set of tools you choose should be able to complete the following tasks for you:

1. project planning (Excel, MS Project, Visio, MS PowerPoint)
2. project scheduling (Excel, MS Project, JIRA, Visio)
3. resources allocation and capacity planning (MS Project, Excel, JIRA)
4. budgeting and monitoring project cost (MS Project, Excel)
5. quality management (MS Project, Confluence, JIRA)

6. storing and sharing documentation and project records (Confluence, MS Teams, SharePoint or Drive)
7. creating and publishing project reports (Excel, JIRA, MS Project, MS PowerPoint)
8. tracking the actual time spent on project tasks versus plan (Excel, MS Project, MS PowerPoint)
9. analysing trends and forecasting (Excel, MS Project).

Get to Know the Team or Select One

As a project manager, you cannot complete a project on your own. It is a team sport. Depending on the project and business environment, you will either have a team allocated to you or you will have the opportunity to get one for yourself.

If the team is allocated, you will need to understand their skills and where they best fit to complete required tasks. If you can choose the team, you will have to evaluate based on jobs what skills are needed and hire individuals.

Either way, you will need to go through the usual team-building exercise. If the team is more significant, you may even need to go through stages described in Tuckman's model of group formation:

1. Forming
2. Storming
3. Norming
4. Performing

The SOW (Statement of Work) & Business Case

Statement of Work and Business Case are two different documents, which are continuously updated throughout the project. However, I have seen them bundled in one paper for simplicity. I will describe each separately but keep in mind you might find them as one.

SOW

As part of the initiation, you will want to start working on the statement of work. It will serve as a baseline at the beginning. You will need the support of your stakeholders to build SOW and refine it before it is approved. SOW has multiple parts:

- executive summary or opportunity,
- objective,
- scope,
- deliverables,
- success criteria,
- assumptions,
- constraints,
- risks & issues,
- stakeholders.

Executive Summary or Opportunity

Describes the purpose of the project, background, high-level scope and occasionally delves into details of the plan. It should be precise and briefly explain the project (almost like the elevator pitch).

Objective

Here you will be explaining how the project addresses the opportunity highlighted in the executive summary. It should be SMART, so it is evident when the project achieves the objectives.

- **Specific:** Supper clear and have no ambiguity.
- **Measurable:** You should be able to measure success objectively. Potentially using critical success factors and resulting KPIs.
- **Achievable:** Project team should be able to achieve the project goals with the authority and resources they have.
- **Realistic:** Something that can be done.
- **Time-specific:** Like any project and objective, we need a specific date.

Scope

The scope is the essential part of the SOW. It identifies the work that the project team will be completing. And, more importantly, identified the work that the project team will not be doing.

It is vital to sign-off SOW because of the scope defined. Almost always stakeholder will want to include additional scope items down the line. Sign-off means that all further changes to scope will need to be re-evaluated and additional resources requested.

Otherwise, your project will never end, and the budget will inflate. Stakeholders should know what they have signed-off on, and you can remind them of the SOW. However, you should be careful and ensure that they indeed comprehend the scope even if it may feel a bit painful to go through everything with them.

Deliverables

You will need to document deliverables the project will produce. It could be things like a website, a manual or even a list of suggestions to business. They need to be clear, so your team and business understand.

Success Criteria

You need to know that the project and deliverables have been completed successfully. Documenting these will allow everyone to be on the same page by showing how success looks.

Assumptions

The document should describe information that the team does not know fully at the time, and what assumptions are needed to proceed with the project. It would be great to remove these as soon as possible to increase project success. Assumptions are unavoidable at the early stage of the project, and some planning, solution and scope

elements will depend on them. It is crucial to point out when you are basing a decision or a plan element on the assumption.

Constraints

Every project has constraints like time, budget, business environment or brand. You need to identify them. Even if you have devised a great solution, it may not fit well with the current business systems, which is a constraint. If you would like to read more on these, see my blog post "[Why are Business Requirements Important](#)".

Risks & Issues

You have to identify risks & issues and then track them in the risks & issues log. The risks & issues log will be likely growing throughout the project. Note:

- **Risks:** are factors that may negatively affect the project plan and parameters
- **Issues:** are events that have already happened and are already negatively affecting the project.

The goal of managing risks is to understand the potential impact and probability and then reduce risks by either accepting, mitigating or avoiding them.

The goal of managing issues is to understand their impact and priority, and then also mitigate them by finding the solution.

Stakeholders

Finally, we will need a list of all stakeholders known to the project at this stage. It is essential to capture contact details, potential interrelationships and roles.

Business Case

The last thing in your list to complete at the initiation stage is a high-level business case. There could be one already done by the sponsor at the earlier stage. Then you are enhancing it in the initiation stage. Theoretically, the sponsor should be completing the business case but in reality, it is the project team and project manager preparing it.

You will need to update the business case at every stage of the project and get it reapproved. Situations, budgets and costs change, and managers need to reapprove on whether benefits still outweigh the costs. If they do not, the project may be terminated or adjusted. Let's see what is in the business case:

- background description,
- cost & benefit analysis,
- risks,
- recommendation,
- options,
- the financial case,
- impact analysis.

Background Description

Similar to SOW the background description describes the current situation and opportunities or issues. We are using here completed GAP analysis and POPIT (Processes, Organisation, People Information & Technology) to identify problems. It also includes insights identified via Feasibility analysis.

Cost & Benefit Analysis

Business needs to compare cost Vs benefits to decide if the project is worth pursuing. Both costs & benefits could be two of types:

- Tangible, which could be development staff or hardware.
- Intangible, like disruption and loss of productivity.

Also, costs and benefits could be measured as immediate or long-term. See the illustration below.

Cost vs Benefits			
		Immediate	Long-Term
Tangible	Benefit	Do not incur additional costs	Less staff needed
		Cost Reduction or	Better response time and service
	Cost	Pay for Hardware	HQ relocation
		Pay for Software	Yearly license cost
Intangible	Benefit	Improved communication	Enhanced organisation flexibility
		Team work	Better MI reporting
	Cost	Staff acquiring cost	Key staff are leaving
		Decrease in productivity	Staff acquisition cost (again)

Risks

These are slightly different from project risks and centre on the impact to the business from doing the project. Some examples would be:

1. the demoralisation of crucial staff
2. loss of key personnel
3. worse customer service
4. the competition takes advantage of a critical period
5. management attention focused internally rather than externally.

Business needs to be aware of these issues to ensure that they have counter strategies or at least can actively address risks. Similar to project risk, we would use acceptance, avoidance or mitigation.

Risk Acceptance

You have identified the risk and logged it but take no further action. You will deal with it when and if the risk does happen. Usually, you accept this approach for low impact risks.

Risk avoidance

When the risk impact is more significant you might want to avoid it. If possible, delay the project or complete the tasks early. Suppose the finance department is busy with the half-year reports in July, and you need their help. In that case move project dates to August.

Risk mitigation

Limit the impact of the risk if it does occur. The problem here is usually smaller and easier to fix. For example, you have a new product, but nobody knows how to use it in the business; thus, you just need to train staff using project team or external resources.

Recommendation

Finally, the project team recommends the preferred solution out of several alternatives identified. Cost, benefits and risks are clearly defined and presented.

Options

The business case should have in total at least three possible solutions thoroughly analysed. Options can be gradual or radical, long-term or short-term. It is important to consider all viable options before presenting the recommendation. You need to go wide before you concentrate on the recommended solution.

Sponsor Suggestions

If the manager or sponsor suggests one of the options, but you think it is a no go. You need to spend extra time analysing and documenting why it might not be the best option for the business as it will be challenged!

Do Nothing

One option must always be "to do nothing." Sometimes it could be just the approach business needs at the time. However, even if you think it is not right, you should still have it as it gives opposing view to the suggested option and the analysis indicates what will happen if the recommendation is not taken.

The Financial Case

Businesses operate in the cost and revenue world. Everything is spinning around P&L (Profit & Loss). Managers need to know how much the project will require, and when will they see financial benefits.

To evaluate if the project will be profitable, we need to use investment appraisal techniques. Note that the project manager may involve the finance department to help with evaluating the project. Three often used methods:

1. **PB:** Payback period or break-even analysis. Shows you when your investment will break even. It is a straightforward technique and the easiest to explain but does not account for the time value of money.
2. **NVP:** Net Present Value analysis. Similar to PB, except that it does take into account the time value of money.
3. **IRR:** Internal Rate of Return method similar to NVP but the output of the analysis gives a rate of return on investment and not actual return value.

Impact Analysis

Impact on the business doesn't mean just cost & benefits. We also need to consider cultural and behaviour changes. Especially now with ESG (Environmental, Social, and Corporate Governance) criteria becoming more popular. Some examples:

1. change in the organisation focus
2. change in recruitment requirements
3. change in relationship with suppliers.

Gathering Requirements

At this stage, you will also start a discussion with stakeholders to understand requirements. Some of these might be already clear from SOW, Business Case and Project Charter, but some you will need to clarify. All of your requirements need to be linked with business objectives and goals. Thus, the requirements will either be delivering functionality, addressing constraint or improving usability. As a result, there are a few types of requirements.

Business Requirements

General

Business Constraints, Transition Requirements or Legislative Compliance

Technical

IT or Architecture

Solution Requirements

Functional

What is the function delivered? What the solution will do for the user?

Non-Functional

How will the function be delivered? What properties will it have? How fast will it be?

You will continuously enhance your requirement in the Planning stage, and in some cases, via change management process during the execution stage. Requirements

tell you precisely what needs to be done and how. Both build and testing will lean heavily on them to make sure everything is delivered and tested.

Documenting requirements can be done in several ways like using:

- Business Requirement Document,
- User Case,
- JIRA Stories,
- User Stories.

You need to choose the one that makes the most sense. For example, if you are running an Agile project, JIRA stories will be the best bet.

Read more about the project requirement in my blog post "[Why are Business Requirements Important.](#)"

SWOT Analysis

Definition of the SWOT Analysis

At the initiation stage, you might want to consider doing a SWOT analysis, which is a strategic decision-making technique widely used in businesses. Though the same technique can be used when considering the project and creating a plan. We could use it both at the company and project level to contribute to our success. SWOT analysis with project examples:

1. **Strengths:** Would be an internal factor within your control that help project to succeed e.g. clear business requirements
2. **Weaknesses:** Would be an internal factor within your control that threatens the project to fail e.g. lack of team's experience
3. **Opportunities:** Would be an external factor outside your control that helps you to succeed e.g. vendor provides a discount that allows you to get additional resources and finish a project sooner
4. **Threats:** Would be an external factor outside your control that could harm progress e.g. COVID-19 could prevent key staff to get to work and delay the project.

Four Additional Techniques to Help With SWOT Analysis

There are also four additional strategic decision-making techniques that allow us to consider all internal and external factors in SWOT analysis. For strengths and weaknesses as they are internal factors, we can use:

1. **MOST:** looks into mission, objectives, strategy and tactics
2. **Resource Audit:** looks into resources that a company has. For example, physical, human, "know-how", reputation and finances

For opportunities and threats as they are external factors we can use:

1. **PESTLE:** looks into political, economic, socio-cultural, technological, legal and environmental factors
2. **Porter's Five-Forces:** looks into competition in the industry/sector threats of new entrants, bargaining power of buyers, threats of substitutes both products and services and bargaining power of suppliers

You can arrange a workshop with all relevant stakeholders to go through each part of SWOT analysis to get a comprehensive picture of potentially strong and weak points for the project. Thus, you will be able to update your risk & issues and address weak points appropriately. Strong points can show you how to maximise the probability of project success. Thus, SWOT analysis can be a very powerful tool in project management if all factors carefully considered.

A Final Word on Initiation

Like everything with the projects, you should be pragmatic. Do not just do things to tick the box. You should think about what will make or break the project. Hint: risks, budget, plan, business case and scope are the right places to start. It could be that your organisation excludes some parts from Business Case or SOW, and that is ok as far as you or business managers have considered exclusions to some extent.

You will also notice that there is larger importance of the initiation stage for the entire project lifecycle. A well-started project will be easier to finish while it will be more expensive to course-correct later down the line. However, the next phase is as important.



Project Planning Process



At this stage, you take everything you have from the initiation stage (like SOW and Business Case), refine it, and put it into the plan with actionable steps and resources aligned. The goal is to create a baseline and a structure for smooth execution, which is the next stage.

There are a few approaches on how to start planning, but ultimately they will be either bottom-up, top-down or mixture of the two.

In This Section, We Will Look Into

- Task planning, which will include identifying the task, estimating time to complete it, building network diagrams and creating a Gantt Chart
- Looking into both people and capital resources needed for the project

- Defining Critical Success Factors and KPIs
- Creating a risk mitigation plan
- Building project management plan
- Looking through the checklist to make sure you are ready for the kick-off meeting.

Task Planning

WBS

Work Breakdown Structure sounds complicated, but it is merely a way to list all your tasks and group them under the natural flow of the project or specific deliverable. Essentially, you breakdown the project into bite-sized tasks.

Where Do You Start?

The first thing is to identify all tasks. It is best to do so together with your team. Project management is a team sport, and it is time to utilise them.

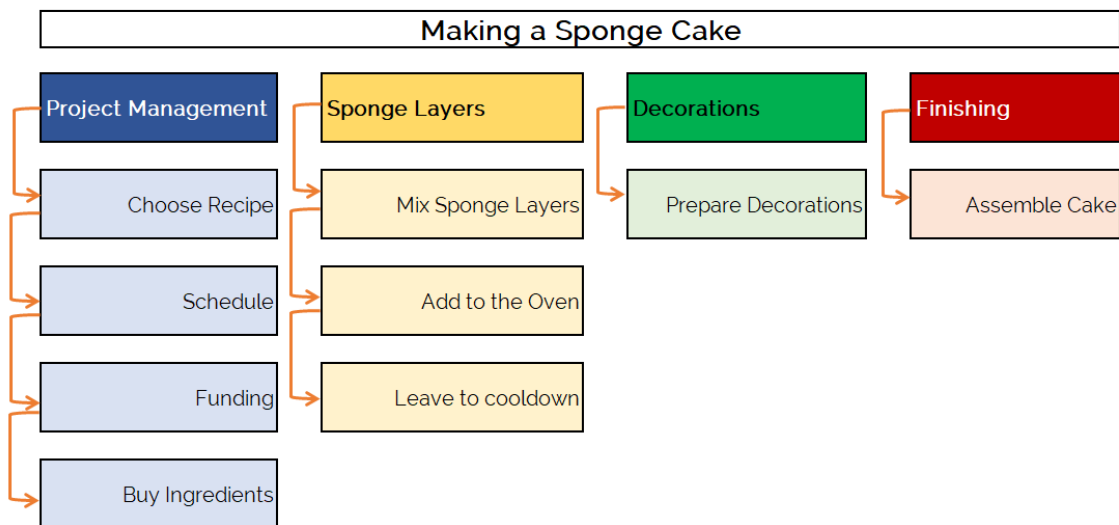
In a group, identify all the milestones, which could be your project stages or specific deadlines. Then work backwards to identify what needs to happen. Also, you could take a shotgun approach, whereby you first list all the tasks and then work to group them.

Whichever approach you choose, usually, you want your grouped tasks to follow the timeline of the project. It allows you to see which tasks need to be finished before others can start. If you are not sure about the milestones for your type of project, invite someone with the relevant past experience to the planning meeting. This way you can lean on past projects and use them as benchmarks in your estimates and task lists.

Examples of WBS

I will use an example project of making a sponge cake to illustrate how a WBS, network diagram and Gantt Chart can look like.

For smaller-scale projects, you can use the following

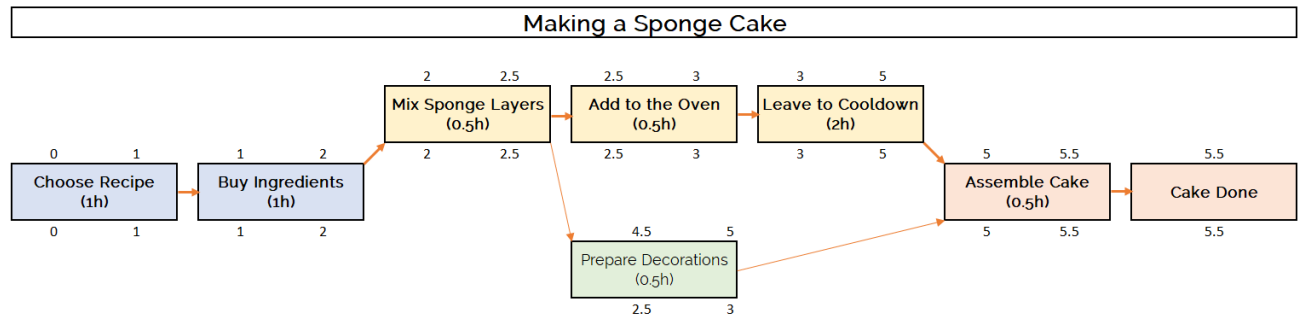


For larger-scale projects, you can use the approach below

Reference	Task
1.0	Making a Sponge Cake
2.0	Project Management
2.1	Choose Recipe
2.2	Schedule
2.3	Funding
2.4	Buy Ingredients
3.0	Sponge Layers
3.1	Mix Sponge Layers
3.2	Add to the Oven
3.3	Leave to cooldown
4.0	Decorations
4.1	Prepare Decorations
5.0	Finishing
5.1	Assemble Cake

Network Diagrams

Great! You have a list of tasks, and you have grouped them nicely. But apart from being in a particular group, the view does not show interrelationships among or sequence of activities. Do you know if you can start something in parallel, or do you have to wait? The network diagram shows how separate tasks are linked, how much time tasks will take and what is the project's critical path.



The graph above shows links between tasks or activities indicated by arrows. Moreover, it indicates two crucial elements:

- What is the earliest beginning and ending points in time for each activity?
- Plus, crucially, it shows the beginning and ending points in time.

Therefore, you know how much wiggle room you have to move things around in your project for each task.

Note: modern software packages like MS Project will evaluate all of this automatically, but it is always good to the working principles

Parallel Activity

During a project, your team may work on parallel activities at the same time. It is essential to identify these as it is the easiest way to reduce overcapacity for team members by prioritising tasks on the critical path and completing parallel tasks before the latest date.

In our example, while the cake is baking in the oven, you can spend time preparing your decorations. Thus two events can work in parallel.

The Critical Path

It is a sequence of events whereby if at least one of them is delayed the whole project timeline is affected. Thus, as a project manager, you want to identify these critical path events and manage them carefully.

Identifying a critical path is a two-fold process.

- First, by going from left to right, I have highlighted when the activity **can** start and finish at the bottom of the square.
- Second, by going from right to left I have emphasised at the top of the square when the activity **needs** to start and finish.

The sequence of activities with no buffers, which means that their "can" and "need" starting times are the same, are shown in the critical path scheme above. In this case, the activities are as follows: *Choose recipe > Buy ingredients > Mix sponge layers > Add to the oven > Leave the cake to cool > Assemble cake > Cake Done.*

Still, there is one activity with a buffer, prepare decorations. You can start the activity anywhere between 2.5h to 4.5h into the baking process, and you will not delay the project.

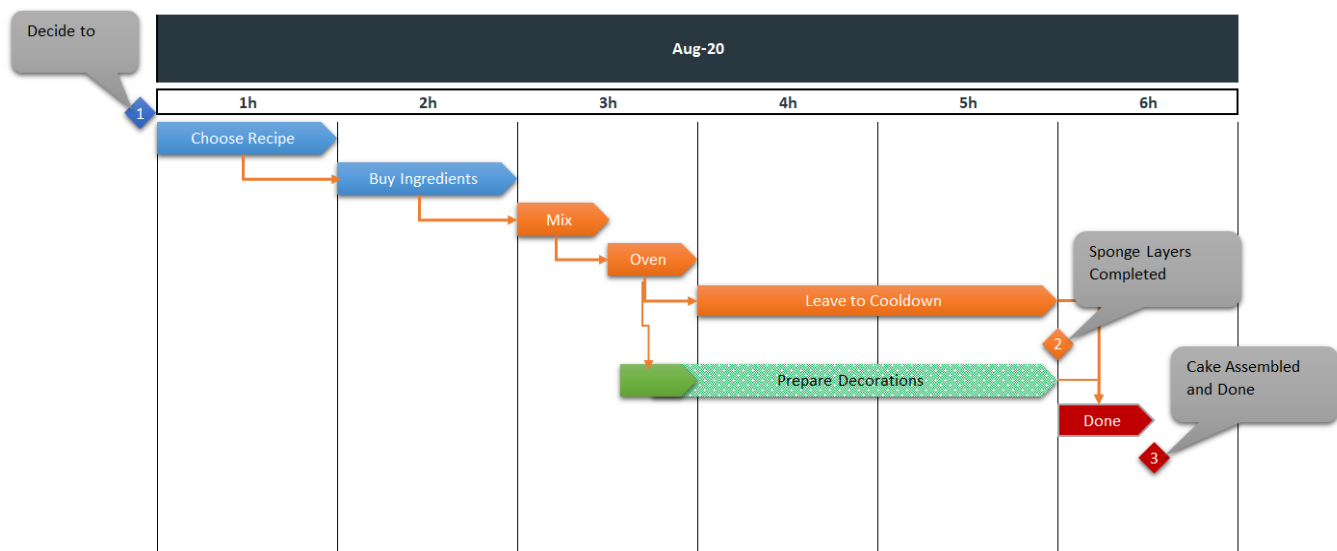
Resources Planning

The goal is to be the most effective in scheduling and allocating resources by trying to get everything you need just in time to complete the project. Eventually, you will use your resources plan within the project management plan.

The task in projects will require time and capital, such as a computer or conference rooms. When you combine all the tasks with resources, you start to see the bigger picture. Furthermore, resources are always limited; somebody else will want them in the organisation. You need to know when you need them to avoid delays or conflicts.

The Gantt Chart

If you are into project management, I am sure you have heard about the Gantt Chart. It is a fancy name for a handy bar chart that indicates when the task starts and finishes. Gantt Chart has its limitations because it only shows tasks and their length, which is not enough to manage a project. Yet, when we combine Gantt Chart, Network Diagram information and Resource Plan, we are in much better shape.



MS Project allows you to connect a bar chart with relationships and shows a critical path. Also, you can indicate how much of the task is completed, who is doing the job and what resources are utilised. If there are individuals whose capacity is exceeded, you will see that and be able to amend the project. You would also add milestones which are depicted by the diamond shapes. Finally, you can create a baseline which will be necessary at the end of the planning stage. Then you can track all your tasks against the planned and actual timeline.

In your Gantt Chart, you want to concentrate on the tasks that are critical to project success. It can get quite a detailed endeavour if you go for everything single task in

the chart. However, when presenting your progress to senior management you may wish to have an option to show a more high-level view in the chart.

Ok, you have your tasks, you know when the team will be completing them and what resources you will need. Therefore, by this time, you start to see a good overview of the whole project. It is time to ensure you have a team with the right skills.

Actual Project Plan Template: [Project Plan & Gantt Chart Example v3](#)

People First

Once you have a clear list of tasks you need to think about the required skill set to complete them. Therefore, you need to determine what roles are necessary for the project's success and assemble a team based on those roles and capabilities.

If the project is large, you may want to create skills workbook. But for smaller projects, it is usually quite evident what you have and what you need. If you decide to create a skills workbook, you should consider:

- basic information about the individual,
- role in the project,
- skill level,
- deliverable,
- effort in Days,
- the dates to start and end the task,
- cost.

Often individuals do not report directly to you as a project manager. Thus, you will need to discuss with their line managers not just skills sets but also their availability as they may have BAU activities to complete. You should try to get an unambiguous agreement from their managers. If you cannot reach one, you will need to escalate to get support from the top. Lower staff availability in the future could become one of the risks you should be considering and highlighting in your risks & issues log.

If they report to you, you will still need to understand their holiday schedule, their commitments to other projects. Also, leave some buffer for sick days.

Finally, you will need to communicate roles and responsibilities to the project team members. Ensure everyone agrees. If you do not do this, people may not be aware of what they are doing and what they are accountable for, and you will be picking up everything.

Capital Resources

Similar to people's resources, you will need to track the availability of capital resources to ensure that you can get them just in time, and your critical path is not affected. You can create a spreadsheet similar to one we have seen with people resources to document costs, timings and availability.

Moreover, MS Project includes functionality to manage people and capital resources as well. Thus, you could have everything in one place.

Define Goals, Critical Success Factors and KPIs

If you want to be successful, you need to measure your success. Thus, you need to define appropriate Critical Success Factors (CSFs), Key Performance Indicators (KPIs) and will need to start with identifying business and project objectives because the objectives are your goals. You will want to ensure these are very clear as you will need them throughout the whole project.

As we have discussed before all objectives should be SMART, which means they need to be measurable. CSF helps to identify where to concentrate your efforts in the project.

Example

Objectives & CSFs

For example, you have a project to enhance the client experience. The project objective is to attract new clients to use the company's app and retain them. One of the CSFs would be to improve the design for the app's UI. If clients like how the app looks, they may stick around long enough to appreciate what the company can do for them.

KPIs

Then you would build KPIs to measure if your CSF has been achieved. Let's say one of the KPIs is the number of people who remain on an app. At this point before the change, you have measured this to be 1 min on average. Now, you do not know if 1 min is good or bad. Thus, you will also need a performance target to use as a benchmark.

Performance Target

Let's say you need clients to stay on the app for 3 min on average to say that your design is good and people like using it. So, by our defined performance targets, KPIs measured as 1 min is not good enough, and UI should be improved through the project until 3 min browsing duration is achieved.

In summary, we base CSFs on the company's objectives. Then KPIs are set up to measure the success of the CSFs. The KPIs will also require a performance target and all defined targets will need to be approved by the project sponsor.

Project Governance

When the project starts, you will need to have established how you will update senior stakeholders and resolve issues or get approvals. You need project governance. You usually have three types of meetings.

1. **Stand-Ups or team meetings:** These are regular from around twice a week to max daily meetings to discuss progress and blockers.

2. **Working Groups:** Every two weeks, you would arrange a meeting to update the sponsor or their senior stakeholders. The purpose is to update the attendees on the progress and any roadblocks for which you require a sponsor's help.
3. **SteerCo:** Every month, you should have a SteerCo meeting, where you invite most senior stakeholders who are interested in the project. You share your progress get a steer on the most pressing issues.

Also, you need to establish communication channels with your teams, for example, JIRA, Confluence or MS Teams. The team needs clear instructions where they need to save documents, where they can find templates, and what are the best channels for collaboration.

Risk Contingency Plan

The risk contingency plan is a bit different to the risk mitigation plan. The critical difference is that the mitigation plan spells out project management actions that would need to be taken if any issues would arise.

On the other hand, risk contingency plan looks at what steps the project needs to take when risk becomes an issue, which is your plan B. You will likely include here the risks that could potentially derail the whole project. So, for high impact items in your risk plan consider:

1. when should you start your plan B,
2. who will be involved,
3. what will be the sequence of actions,
4. communication,
5. updating plan regularly.

The risk contingency plan is your last defence and lifeline. Keep it close; it may just save the project.

Creating Your Project Management Plan

Time to put everything you have completed so far into one congruent plan, which we surprisingly call the project management plan. You should consider including the following elements:

- project management approval page,
- executive summary,
- project charter,
- objectives,
- project assumptions and risks,
- project scope,
- deliverables,
- stakeholders,
- project organisation,
- work breakdown structure,

- network diagram,
- Gantt Chart,
- resources,
- costs,
- procedures,
- project directory.

Depending on the project, you will leave some bits out or add additional ones. Again, think about what is essential for your project success.

Check If You Are Ready For The Next Stage

The next phase will be "Execution", but before you can start it, you need a kick-off meeting, which says that the project will go in high gear now. Before this meeting, you need to make sure you have done your homework. Below is the checklist of the things you should have completed before booking the session and creating an agenda.

- **Establish vision and deliverables:** you are clear on your goals & objectives and timeline.
- **Identify team and set roles:** you have a full list of people, who will work on the project with detail information and contact details.
- **Develop initial project plan:** you have your project management plan, a kick-off meeting will add final touches before baselining.
- **Define metrics for success:** you have your Objectives, CSFs, KPIs and Performance targets.
- **Identify potential risks and bottlenecks:** you have your risks & issues log and ready to use it from day one.
- **Establish logistics for team communication:** you have your project governance setup, and the team is clear how they should collaborate.
- **Choose the work process or project management methodology:** you will need to choose how you will run the project. Will it be something like Waterfall, Agile or something in between? Do not concentrate too much on the detail - do what makes sense.
- **Decide which tools you'll use:** make sure everyone knows what tool they should use, such as MS Team, JIRA, Confluence, etc.
- **Schedule the kick-off meeting:** all critical stakeholders should be at this meeting. You need to get all the buy-in you can, which will be your capital to get things done. Spend it wisely. And keep those stakeholders updated using SteerCo meetings.
- **Set the agenda and prepare the slides for the meeting:** for this meeting as well as for any session you will ever do, make sure you have a plan, and you follow it. Alternatively, the meeting will be about everything and nothing at the same time, and you will not trigger the actions or reach decisions you need to progress.

Project Execution Process



People are different, and some like action more than planning. For those, execution is the time to shine. This phase is all about working on those assigned tasks, answering questions and addressing concerns, and implementing course-corrections as necessary.

But before you can go into that high-gear, you need to have a Kick-off meeting, where everyone is baselined for the project. So, what should you put on the agenda of the meeting?

- Introductions
- Project background
- Project objectives
- Project scope
- Project plan
- Risks involved and how to avoid them
- Project Governance
- Stakeholders
- Roles & responsibilities of stakeholders
- Questions & answers
- Next steps.

After the meeting, you will need to complete a report on all decisions and comments made. You should do it within 48 hours while everything is still fresh in your head. Save the summary email in a dedicated location for completed documents, like Confluence page. You should do this after every Working Group and SteerCo meetings as well.

Managing & Leading

As a project manager, your job is to manage individuals who will be reporting to you for the limited period of time. However, they may have their permanent managers as well, or they could have more experience in the project world. Thus, your role can become quite complicated and require some finesse.

On top of that, you have a brief period to build a team for your project and become operational as time is pressures. Rarely, building a team is part of project deliverables, yet, you still need to do it to get results.

A lot of how you manage these assigned people will depend on your personality or the company's culture. There are a lot of books about team management.

The key is to understand the most productive way forward and achieve the best results. In some cases, you will have to be more direct, when time is pressing; in other

cases, you can be more relaxed and collaborative when there is an emphasis on quality. Though, most of the time you will be somewhere in the middle.

If you are not sure, you can always have a cup of coffee with your sponsor or other project managers in the company to gauge the strategies used.

Ensuring Your Team Works Well

So, how do you make the team work well together? Well, you need to set up a common goal for all.

Get the group with complementary skills. Such that each team members can pick a different part of the project linked with their competences. Sharing work increases collaboration and available parallel task for a project as you are not dependent on just one individual.

As before, you need people in the team to understand their roles and responsibilities. Ownership can go a long way. But if team member tasks start overlapping this could cause unnecessary conflict.

Help members to work in teams as well as individually. When you need more creativity to solve a problem, get everyone together. If there are time pressures, some individual work may need to happen.

A big part of your role as a project manager is listening. If a team member has concerns, they must have a reason for it. The team is your eyes and ears. Investigate all reasonable concerns even if they do not go anywhere. Not listening is a recipe for demotivation.

You must always do what you say and show an example to your team. You cannot ask your team to complete tasks on time if you do not yourself.

If you can give praise to a team member, do it in public! If a person has other line managers, inform the managers. If you have to say something less pleasant, do it in private. Never say it in front of other people and be kind, we all only human.

Do not be a doom and gloom manager! The project always has issues if you react to every problem with misery; you will get depressed and will drag down your team. The key is to respond calmly. There is always a solution, and as a grown-up with experience, you will do your best to find it.

If you do not want to become a micro-manager, you need to communicate the roles and limits within the project. Then leave the team to do their job. If you have smart people in the group let them use that experience to produce results. Occasionally via stand-ups, you will need to correct the course, but if not affecting critical path allow people to do their thing.

If the team have issues working together, have one on one meetings. Understand their perspective and together find a way forward. Everyone will never be happy at all times; it is part of the job and reality.

Communicating

You must communicate a lot with your stakeholders. I have a whole blog post on the topic called [Stakeholder Management For Personal Success](#). There are different levels of communication necessary depending on power/influence and interest of the stakeholder.

If people are not informed, they think the worst and assume you do not know what you are doing. If you communicate and provide action plans for any issues, people are generally ok and let you do your job.

Part of communication is also listening. I learned from the book "How to win friends and influence people" by Dale Carnegie about the best conversations where you just listen. Yet, it is also true in the project world. If you only listen people will tell you their expectations, find answers to their own questions or raise valid concerns. How can you solve issues, understand concerns or expectation while talking? Only by listening you will get that information.

Finally, you should collate helpful project information in one place. Allow your stakeholders to access this data. When they have questions they may find answers themselves. Thus, you will save some time for your team. Plus, if your project is significant you will need such a location to share data within your group.

Building and Testing

This stage is also about building and testing your solution. The project will spend most of the money here. You will get developers, designers and testers involved. The goal is to provide a solution that meets project objectives. Thus, you will ensure that the team will complete all the requirements that are mirroring the objectives.

Final Word on Execution

You probably noticed that for the execution stage I spent a lot of time talking about managing and leading a team. The reason is that the team is doing the work and you need to make sure that relationships are great to produce smooth project results.

Project Controlling & Monitoring



If everything goes to the plan, we would not need this phase. But the world is not perfect and so is the project management plan. The steps go in parallel

with the execution stage. Here as a project manager, you monitor for any deviation from the plan and make required adjustments.

You will likely need to update the project plan and potentially the scope during the project. However, you should maintain the baseline you established after the kick-off meeting, and any scope changes need to go through change management.

Review Meetings

You could have a separate meeting just to review project changes. Though, the reality is that you will never get stakeholder's time for Working groups, SteerCo, Stand-ups and now Review meetings.

My suggestion is to highlight any significant changes in the Working group or if appropriate in a SteerCo. In preparation for these meetings, you need to monitor your project plan activities and see when things deviate from the plan. If you cannot course correct via relocating resources you will need to bring this to one of the review meetings.

Usually, you have senior stakeholders in your Working Group or SteerCo. You will need to decide based on the complexity of the decision, who needs to approve it. Then you need to make sure that you have that individual in the meeting.

Keep up with the agenda as all items there should be highly critical to project success. You are there not to chit chat but to have approvals and actions confirmed; the time is extremely valuable during these meetings.

Always verbally summarise if there is the time at the end of the meeting. And definitely send a summary email around with all actions and significant decisions within 24-48 hours. Keep a log of all decisions and activities and follow up with updates for the next SteerCo.

Scorecards and Gantt Charts Use

The best way to update your stakeholders and highlight issues is via Scorecards and Gantt Charts. The Scorecards should include the following groups in one single page, and it must be only one page.

1. **Overview & Deliverables:** Which includes background and significant deliverables together with a project reminder to everyone. Senior stakeholders oversee multiple projects and they are not as close to the project as you are. A little reminder goes a long way.
2. **Current Activities:** Month on Month and status.
3. **Key Risks** (Red and Amber): Here you highlight major risks. Do not give the full list of risks & issues.
4. **Project info** (Project Manager, Sponsor, Date of the card)
5. **Overall RAG:** how you were doing last month and this month using the G-Green, A-Amber, R-Red ratings.
6. **RAG Explanation If not Green:** If your project is not going well, you need to explain.

7. **High-Level Gantt Chart:** Present a very high-level chart with baseline information.
8. **Action items:** Actions that have been taken from previous SteerCo or other forum and current status.
9. **Other Comments:** High-Light any issues like lack of resources or increasing costs.

In a second page, you should provide more detailed Gantt Chart with the most critical steps for the project. Say if the project's purpose is to acquire a third party system, and the third party is doing the build highlighting the procurement will be super important.

Resolving Conflicts

Organizations and projects are run by people and conflicts are inevitable given the different background of the people involved.

Usually, you have a conflict because:

1. Different stakeholders have different objectives for the project. In particular, where there are two sponsors for the project
2. Also, if roles and responsibilities are not clear people can become very sensitive when it comes to their ownership
3. Sometimes people just do not see eye to eye with each other due to different working styles or personalities.

Resolving Conflicting Objectives

Get stakeholder/sponsors in the room and just have a discussion. You should try and get a consensus decision. If possible, prioritise requirement or objectives just right there and reach an agreement.

If you have only one sponsor then he/she can make the final call. Though, if the sponsor cannot impose a decision for various reasons you would escalate to the project board which is your SteerCo. In the meeting, you should identify resolutions. Potentially you will need to investigate the implementation and update the forum in the next meeting, which will be your actions. Of course, as for any SteerCo, you need to document decisions.

Roles & Responsibilities are Not Clear

On paper this is very easy; you clarify roles & responsibilities. In reality, the conflict is because somebody wants more or less of responsibilities which overlap with somebody else's. Thus, you need one-to-one meetings to understand conflicting needs and then find the common ground at a subsequent group discussion.

Different Personalities

If you are dealing with different personalities have a face to face discussion with those members and try to see things from their perspective. Never criticise but try to find common ground. Organise group meetings and try to find a common ground in the team by concentrate on the project objectives and goals. Project is a temporary

endeavour, and ultimately people are there to contribute with their expertise. There is no need for drama.

Technical Issues

If the conflict is due to technical problems and the team is disagreeing on the best way forward you can invite an SME, i.e. technical expert, could also be an external party, to advice.

Tough Choice

As a last resort if your team member is not working well together with other individuals and you have done everything you can to integrate him or her; then maybe it is time to look for somebody to replace this individual as you need to move on with the project.

A Final Word on Conflict

It might sound controversial but you should not avoid conflict; it is part of life. The key is to manage conflict professionally by clearly discussing the arguments.

The dispute could arise because something is not working, and people did not identify the cause. Discussion in such a setting would help to identify the issue and find some alternative solution.

If you are managing a team across different countries, a conflict could mean different things. You should have a discussion on the topic with the group and try to adapt to the group or communicate your working approach to conflict. Most likely, you will do something in between.

Resolving Project Problems

Even if you have completed your primary tasks as a project manager such as planning, risks & issues management or resolution finding in planning, execution, monitoring and control stages, there could still be multiple types of problems popping up in the project. The more common ones are below, which link back to our triple constraint.

People Skills

If the project team lacks any of the required skills it may affect projects outcome. You should have identified such potential issue in the planning stage and highlighted it in both in the project plan and risk & issues log specifying a clear solution and time to complete it.

You can address the issue by training your team through online classes, lectures, or even doing training yourself. Alternatively, you can get an outside contractor or a consultant to do a specific task for you. It all comes down to the cost and benefits decision. Depending on your authority to control the budget, you may need to get approval for such external hire from your sponsor or even from the SteerCo.

Your Project Delayed

Some tasks may take longer than estimated. If correcting discrepancies between the estimated and actual time is within the project manager controls, try resolving delays yourself by prioritising tasks and reshuffling resources.

If you are not able to resolve any issues within the allocated time or resources then you may need to request time extension or additional resources. You would seek the approvals for your requests from the working group and the SteerCo.

People will always want to give you more tasks, which may or may not be part of the project. Be very careful with additional duties which are explained in the following section.

Scope Creep

Stakeholders will want the whole world; sometimes, with little consideration for the budget. Your job is to make sure that they get the most significant possible value within that budget and within the agreed scope.

Any new scope elements would increase your workload and add to project tasks or would take time away from the other tasks that you have already planned. You need to manage all the new asks very carefully, which nicely links to **Change Management**.

Project Cost Above Budget

Even if, you did the best estimation you can, and maybe even left some buffer, it is still possible to go over the budget. Managing your project carefully will allow you to identify new budgeting issues. Therefore, you can start aligning expectations as soon as possible.

You can try saving costs here and there, but it is likely to decrease the quality of the results. If you cannot lower project cost yourself you will end up with two options: asking for additional funding or reducing the scope.

Final Word On Problems

Most of the problems exist because of two main reasons:

- The project scope was not clear to the sponsor or they misinterpreted some elements of it. If the sponsor has signed SOW or Project Plan, it does not mean they remember fine details of the scope.
- Also, poor planning due to the lack of previous experience with particular projects. You should have highlighted a low level of company expertise in risks & issues as well.

With all of these issues, you need to come with a clear story and action plans to the SteerCo and Working Groups. You do not want to go to forums with no suggestions as the stakeholders will think you have no clue what you are doing—document all the decisions.

Also, if you have to change scope, time and budget be careful, do not think that asking for less is better. Because if you need to go back to the same forum and ask for more next month, this will also show you have no clue what you need.

Change Management

When you run a project, you will always face change. We are talking here about everything that affects project parameters, for example:

- Tasks
- Scope
- Budget
- People
- Processes
- Structures
- Job Functions.

The scope notoriously comes up in change management as stakeholders always want more for less. So, the question is not IF but WHEN you face change. Do you have a clear framework to address it!?

Change Framework

All projects and organisations should have an agreed process and change request forms created before you even start a project. Anyone who would like to make the change has to fill in the form. In theory, the stakeholder would do this, but in reality, it is you.

As a project manager, you need to evaluate every single change request and the impact on your project. The change could affect time, cost, scope and quality. Then present requested changes and their impact to the project forums like the SteerCo and the Working Group. If the organisation is small you may need to decide without a forum.

Say we have presented a change at the SteerCo, who will accept or reject it based on impact and reward criteria. If you need additional resources you should have a proposal ready for approval, thus, avoiding any further delays. If the amendment is denied or accepted and the relevant stakeholder is not present, you will need to inform that stakeholder about the outcome.

Regardless of the results, you will need to document that you have considered any particular change. If successful, you will need to update the project plan and all affected parameters.

Finally, update all other impacted stakeholders through appropriate channels, likely it will be via the Working Group, team meeting or email.

A Final Word on Control & Monitoring

At the end of the Execution, Control & Monitoring phases, all of the agreed project deliverables should be completed and accepted by the customer or sponsor. All other stages will focus on cleaning up, delivery to BAU and closing.



Project Closing Process



Congratulations! If you are at this stage and managed most of the hard work carefully, you have almost finished. The stage exists as all projects have a distinct start and end dates and you need to make sure that your team have completed all of the project's tasks. At this stage, the BAU business operations should be entirely equipped to take over the process.

When considering outstanding tasks, think about any manuals, Standard Operating Procedures (SOPs) or ensure that BAU can access all shared information.

You can also start letting people go back to their day to day work or a different project if they have completed their tasks.

You need to close all contracts that are no longer required and pay all outstanding invoices. Complete admin tasks, like having a clear structure for all files that the team has handed over.

Organise a "Lessons Learned" session which is similar to the Working Group, where we discuss what worked well and what did not. Often, you have the Project Management Officers (the "PMOs") organising these sessions. The goal is to learn from mistakes and replay what worked well.

Get approvals from your sponsors and senior stakeholders, who have an interest in the project. In my experience, approvals come via the sponsor as he/she is ultimately responsible for the business side business.

A "thank you" goes a long way! Show your appreciation to your team for great work. If you reached this stage, it must be a good result even if you had some roadblocks on the way.

Celebrate - you did it!

The Project Evaluation Report

The final step is to create a project evaluation report. What should you include there?

- Evaluate project results against your objectives, goals and requirements you have established in the planning stage.
- If appropriate complete team members appraisals. It will be helpful for their line managers. Hopefully, this will lead to significant recognition or necessary improvements.
- Summarise what you have discussed in the "Lessons Learned" and provide recommendations for future projects.

Ensure that all documents are stored where the business can access it after the project is closed.

Conclusions

Congratulations on finishing this eBook on Project Management! I hope you have learned a great deal and enjoyed the material. Feel free to share the blog post on social media to help others as well. Plus, if you would like to learn continuously subscribe to my Newsletter, I post bi-weekly on my website:

<https://www.insightspotter.com>

Insights Spotter is all about how to become a full-stack project professional. You will find excellent materials about Business & Data Analysis as well as Project Management. Let's meet there!

About Me

I am an experienced Business & [Data Analyst](#) as well as [Project Manager](#) with multiple years of experience gained in several international companies.

These days business problems require not just data crunching but also telling stories to make the right decisions. To put it simply business [stakeholders](#) need insights.

This is where I come in. I have learned and applied [Python](#), [Power BI](#), [SQL](#) and Excel to analyse and present data. Also, I gained experience in Project Management and Business Analysis. So, I can not only spot insights but execute business decisions. Moreover, I can teach you as well. [Read More](#)

