

Teamleader 

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# THE BASICS OF PROJECT MANAGEMENT

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## WORD OF THANKS

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# THE 7 DEADLY SINS OF PROJECT MANAGEMENT

According to the Project Management Institute, only 26% of all projects succeed. That means most projects fail: they aren't finished on time, go over budget, or don't have the desired end result. A lot of these failures can be attributed to bad project management. Before we dig into the many ways to improve results, here's a non-exhaustive list of things that can go wrong.

## 1. BAD COMMUNICATION



We all agree that sharing information and knowledge proactively is essential for any project, right? Still, it turns out that poor communication is the main reason why projects don't have the desired outcomes or simply fail outright.

Poor communication can have many causes: language barriers, non-complementary personality traits, workplace factors, failing channels... The possible consequences are manifold as well: different expectations and thus disappointment, bruised egos, unnecessary stress because of a lack of overview, last-minute requests and rushed work.

## 2. FAILING TO PLAN (IS PLANNING TO FAIL)

When a big project lands on your plate, your first reflex will be to dive right in and start gathering business requirements. Planning is often regarded as a second-rate activity, as something that has to be done but doesn't add value.

However, failing to adequately define the scope, responsibilities and timeline of a project is a surefire way to get into serious trouble later. Without a good plan, you risk a lack of business support, resources and time, as well as missed deadlines and angry colleagues or clients.

## 3. LOSING TRACK OF THE DETAILS

The devil is in the details. When you're juggling a lot of projects at once, keeping track of them can be difficult. How much of our budget do we have left? Who is responsible for what? Are we still on track to meeting the deadline?

Everybody dreads awkward silences in status meetings, or – god forbid – talking about the wrong project to the wrong client. At the very least, it doesn't inspire confidence. At worst, it might sink your entire project.



#### 4. USING THE WRONG TOOLS

As a project manager, you'll find yourself using multiple tools to keep track of assignments, team members, deliverables and project statuses. In many cases, however, the software you use won't meet your expectations, isn't flexible enough for the kind of project you're handling or slows you down immensely due to its complexity. The result can feel like eating soup with a fork.



#### 5. LACK OF MONITORING AND CONTROLLING

OK, let's assume you've started your project and created an air-tight schedule... but then you never or very rarely update the planning. To make sure everything is going according to plan, you'll need to perform regular checkups and make changes where necessary. That also means frequently checking in with the team to see how you can prevent things from slowing down.



#### 6. NO RISK MANAGEMENT

Because every project is unique, there is always a certain level of unpredictability built in. Qualifying and quantifying that uncertainty and proactively anticipating the factors that might go wrong and how you will respond if they do is called 'risk management'. And yes, it is also part of the job when you're a project manager.

#### 7. CHANGES IN SCOPE (OR: 'SCOPE CREEP')

Here's a classic scenario: a project stakeholder asks for a 'little change' or a 'small addition' to the scope. So small, in fact, that they don't expect budget or timing to be affected by it. Right? Wrong!

Every project is an artful balance of cost, time, performance, quality and risk. Disturbing it is almost always detrimental to the project and its outcomes. As a project manager, it's your duty to guard that equilibrium and point out to your stakeholders when they are jeopardizing the balance of things.



**THERE YOU HAVE IT:** these are the seven deadly sins of project management. While the causes of failure vary widely depending on the type of project, most can be attributed to one or more of the above. But fear not: redemption is near. Let's take a look at how we can prevent disaster from happening.



# WHAT MAKES FOR GREAT PROJECT MANAGEMENT

Every project is different and might require a different approach. Understanding the following fundamentals, however, will get you a long way in most cases. Consider them from the get-go and set yourself up for success.

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## ASK THESE QUESTIONS FIRST

Before and during a project, ask yourself three main questions:

### ► WHAT HAS TO BE DONE?

These are the defined tasks that have to be completed to achieve the project's goals. In many cases, they will be interdependent. This means that one task can't start before another is completed.

### ► WHEN SHOULD IT BE DONE, AND IN WHICH ORDER?

Define the starting and end points, and the order in which the various tasks must be carried out.

### ► WHERE DOES THE PROJECT STAND?

To answer this last question, you'll need to set milestones: defined phases of your project linked to a budget target and the expected result. Having a clear view of your milestones will be a tremendous help in efficiently planning your project and reacting to changes.





## THE 'IRON TRIANGLE' OF PROJECT MANAGEMENT

The iron triangle visualizes the three interdependent dimensions of a project: quality, time, and resources. Every time you make a decision concerning one of these elements, consider its effect on the other two.



### ► TIME

The life cycle of a project consists of a starting point and an endpoint between which defined objectives are fulfilled. Reducing the project's timeframe means you'll have to increase the budget to allocate more resources to it, or reduce the scope to ensure everything can be done in time.



### ► COST

Every project has a finite budget to work with. Reducing the cost of the project will force you to reduce its scope, or increase the allotted time so you can look for cheaper resources.



### ► SCOPE

A project's scope consists of all the specific business objectives you work toward and tasks that need to be completed. These goals and tasks should be clearly defined early on in the project, and they should be measurable and achievable. Changes to the scope of a project always have an impact on cost and/or time.

## BALANCING THE TRIANGLE

In short, project management means balancing the three dimensions of the iron triangle to satisfy the project's stakeholders. It's essential to inform the latter about the specific constraints of the project and the effects that a change in one dimension has on the other two. You'll be better poised to manage expectations and avoid misunderstandings, disappointments and frustration.

# THE 8 ESSENTIAL SKILLS OF A GREAT PROJECT MANAGER

The project manager has a vital role to play in every project's success. Apart from harassing everyone about deadlines, he or she needs a particular set of skills to get the job done. Here are the 8 essential talents every project manager should possess to a greater or lesser extent.

## 1. COMMUNICATION

Great project managers are great communicators. They know how to define clear goals, explain the tasks at hand in a way that enables all team members to immediately know what's expected of them, and enlighten the customer or requester with concrete results. They also know when a phone call or a meeting is required to get everyone on the same page, or when a simple email does the trick.

As we've seen in chapter 1, most projects fail because of miscommunication. By communicating promptly and clearly, the project manager keeps a tight grip on the project while building credibility and fostering engagement.

## 2. LEADERSHIP

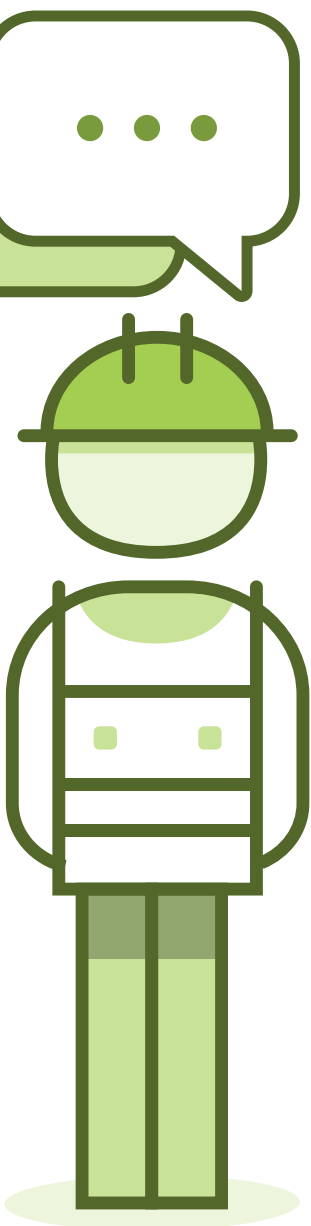
Great project managers are assertive and likeable at the same time. They know how to inspire, set a clear vision and motivate each team member to work effectively towards a shared goal.

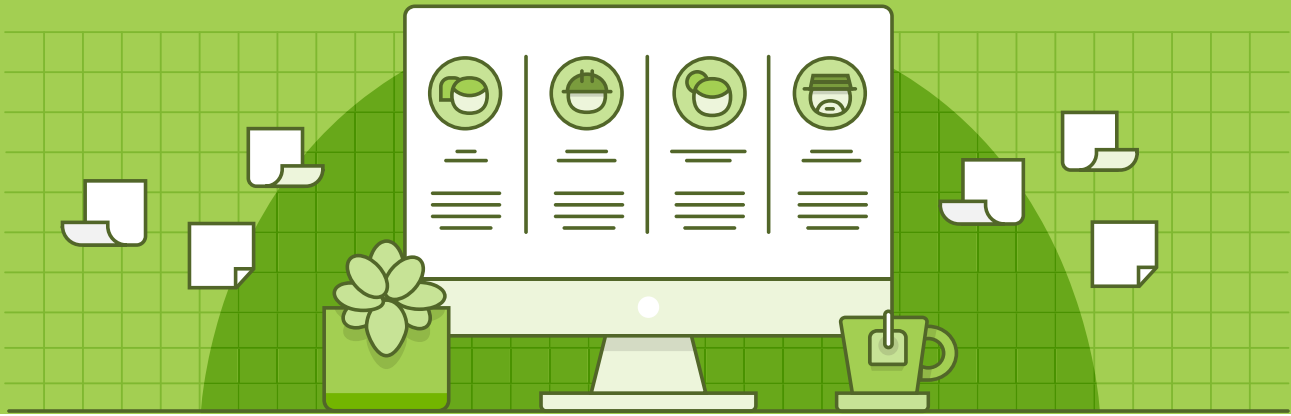
## 3. DIPLOMACY

People are only human after all, so many projects come with their fair share of (personal and professional) conflicts. A great project manager can defuse any conflict and create a win-win scenario for everyone.

## 4. TIME MANAGEMENT

Time management is more than adhering to a set schedule. It's also about the ability to respect your own time as well as that of your teammates. This means: dare to say 'no' when your schedule doesn't allow it, and make your meetings super-efficient.





## 5. CONTROLLING COSTS

Another critical project management skill is budget management. Unless you're working for a sheikh or an over-funded start-up, chances are you'll have to account for every penny you spend. 'Less is more' is the motto of our time, so make sure you manage your project's finances intelligently to get as many things done with as few resources as possible.

## 6. RISK MANAGEMENT

The ability to control or anticipate risks is a sign that you are on top of your project. After all, everyone hates surprises. Make a list of things that could go wrong before they actually do, and come up with ways to react so the impact is as small as possible.

## 7. MEETING SKILLS

A project manager will likely spend a lot of time orchestrating meetings with various audiences, from team members and clients to the senior management and other stakeholders. Preparing for these meetings ahead of time can save you a lot of trouble: invite only the people who are crucial to the success of what you will be discussing during the meeting, send them the list of topics in advance (along with any questions), clearly state the objectives at the beginning of the meeting, and keep a close eye on the clock.

## 8. SUBJECT MATTER EXPERTISE

Project managers who know the project's topic inside out have a major advantage over those who don't. While many people would argue that 'the planning is more important than the plan', what makes a project manager not just good but great is their expertise in the project's subject matter. Knowing the ins and outs allows you to answer tough questions and helps you adapt more easily when needed.





# THE 5 PHASES OF A PROJECT

The amount of planning and work required to complete a project can be overwhelming at first. Instead of throwing yourself out of the nearest office window, try breaking it all down into 'manageable' portions and structure the required efforts into clear steps.

Most projects have 5 phases: initiation, definition and planning, execution, implementation, control and close. Each contains specific tasks that will help you reach your project goals.

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## 1. INITIATION

In this phase, your team will be evaluating the project idea: Is it part of our company's core business? Can we do this? Will it benefit the organization? If the answer is three times yes, then you can start defining the scope or desired outcomes of the project and identifying potential partners. Consequently, if your project requires a feasibility study, this is the time to do it.

The end result of this phase is a project plan, which needs to be approved by all parties involved. Doing this right prevents misunderstandings and false expectations later on.

## 2. PROJECT PLANNING

In this crucial phase, the roadmap for the rest of the project is laid out. This includes (but isn't limited to):

- setting concrete goals and objectives
- estimating costs
- defining scope and key deliverables

### Questions to ask before doing anything else:

- What's the value of this project to the business?
- What are the desired outcomes?
- Is it feasible?
- Who will work on the project?

The project plan will contain information about the procurement of resources as well as how to produce quality output, handle risks and unforeseen circumstances, communicate within your team and with external stakeholders, and more. Ideally, it also contains a clear timeline of what needs to happen when. A great way to do this is by creating milestones: high-level goals with clear end dates.

By the way: don't get too attached to your planning. Things will never run exactly as you envisioned: someone in your team might get sick, or certain tasks take may prove to be a lot more challenging than anticipated. As a project manager, your job is to keep a close eye on timing, scope and budget, and adapt where necessary to make sure that the goals are met.

## SETTING GOALS THE S.M.A.R.T. WAY

One of the most-used ways of ensuring that you set the right goals is S.M.A.R.T. This mnemonic usually (but not always) stands for Specific, Measurable, Achievable, Relevant, and Timely.

Make sure your project's goals are:

**Specific:** Is your goal well-defined and clear to anyone with a basic knowledge of the project?

Make sure you can answer all the basic questions: What do you want to accomplish? Why is it important? Who is involved? Which resources are required?

**Measurable:** A measurable goal allows you to track your progress, which helps you to stay motivated and focused. It also means you'll know when it's done.

**Achievable:** To be successful, your goal needs to be realistic and attainable.

Make sure you can answer these questions:

- How can this goal be accomplished?
- Based on the present limitations (in terms of budget, for example), how realistic is the goal?

**Relevant:** Make sure the goal has been agreed upon by all the stakeholders at the start of the project, and that it ties in with other relevant goals.

**Timely:** Is there enough time to achieve your goal? Make sure you always have a clear deadline.

Some sources add the focus areas **Evaluated** and **Reviewed** (S.M.A.R.T.E.R) to underline the importance of efficacy and feedback.

## 3. PROJECT EXECUTION

In most cases, this is where the project becomes visible to the outside world. It usually starts with a team kick-off meeting where everyone is informed of their tasks and any relevant project details. This phase is about creating quality deliverables. As a project manager, your task is to allocate the right resources and keep your team members focused on their assignments.

You guessed it: the success of the project execution phase depends on how thorough you were in the project planning phase.



#### 4. PROJECT MONITORING AND CONTROL

This phase often overlaps with the execution phase. In the course of the project, you'll keep a close eye on the status of the deliverables, and schedule regular team meetings to ensure that you remain on track. This is also the phase where you'll be vigilant for 'scope creep'.

Want to keep the number of status meetings to an absolute minimum? Cloud-based project management software allows team members to update task status in real time.

#### 5. PROJECT CLOSURE



A project is closed when the finished deliverable has been formally handed over (to the client), and all stakeholders have been informed. But before that happens, it's wise to sit down with the team and evaluate the project: what went well, and what could have gone better? This will help you avoid similar mistakes in the future and allow you to build stronger processes and create more efficient teams.

### HOW TO INVOICE A PROJECT

If you're a project manager in a project-centered SME, chances are that invoicing is part of your job as well. How you bill a project is crucial for proper project closure and customer satisfaction, not to mention your business's finances.

#### FIXED PRICING

Projects can be billed based on a fixed price. While it's seldom the cheapest option, it eliminates unpleasant surprises. That's why many clients prefer this approach. For you, however, it can mean some extra work, since it's not always easy to make correct estimates for each part of the project.

Ideal for: large, unpredictable projects

#### VARIABLE PRICING

Variable pricing allows you to map out time and materials as you use them over the course of the project. This approach gives your team more breathing space, but be sure to be transparent towards your customer. Tell them exactly what they're paying for to avoid arguments later on.

Ideal for: large, unpredictable projects using



# HOW TO ASSEMBLE A GREAT PROJECT TEAM

Project managers rarely work alone. In many cases, you'll need people with the right skills and personalities to attain your goals and conquer deadlines. But how do you build the perfect team for your project?

## 6 PEOPLE YOU'LL NEED ON YOUR PROJECT TEAM

While every project is different, there are some roles that should be accounted for at all times, no matter what business or industry you're working in.



### 1. TEAM LEAD:

the guy or gal guiding the team, obtaining resources, overcoming challenges and solving problems. In big companies, this is often a project manager. In SMEs, the team lead is more likely to be someone who's responsible for specific projects, making them a project 'owner'.

The team lead sets both the client's and the team's expectations and makes sure all the project stakeholders are on the same page. He or she also closely tracks the budget and progress.



### 2. SUBJECT MATTER EXPERTS:

every project requires a number of specialists who are responsible for specific aspects of a project. Think of developers, designers, copywriters, photographers and architects, for example.



### 3. BUSINESS ANALYST:

product owner or active stakeholder: whether it's mapping the project requirements, documenting user stories or creating insightful reports, you'll need someone to track the project's deliverables. This valuable team member keeps the customer in mind and maximizes ROI.

In smaller teams, this role is often picked up by the team lead. Still, if you have the resources, it can be worthwhile to include an additional person who has a helicopter view of the entire project.

### 4. EXTERNAL ADVISORS:

when you're knee-deep in a project, you can end up becoming blind to certain problems. That's why it is interesting to include external consultants to get a different perspective and bring new approaches to the table.



### 5. PROJECT SPONSOR:

the role of the project sponsor can be somewhat obscure. In many cases, he or she is part of the senior management of the performing organization. The sponsor often appoints the project manager, approves the budget, ensures the availability of resources, and helps to resolve conflicts or remove obstacles. In addition, he or she also signs off on approvals to advance each project phase.

### 6. CUSTOMER:

the customer defines the project's value. Whether this role is filled in by an individual, a team or a third party (a communication agency, for example), all customers should get similar treatments. Before any wheels are set in motion, the goals of the project should be aligned with the requirements of the customer. This ensures a customer-centric approach.



## ASSIGNING DIFFERENT ROLES

Having a clear understanding of project roles provides much-needed clarity and structure. Your team members will know who is working on what and can quickly follow up on feedback or questions. At the same time, a clear structure also helps you create a feasible timeline.

Ideally, people's talents and personalities are aligned with their team roles and everyone understands how to achieve assigned tasks. Giving each team member specific responsibilities creates a sense of ownership and boosts productivity. Just keep in mind that what someone likes to do might not be what they're good at. Make distributing tasks a collaborative process: invite team members to share their thoughts.

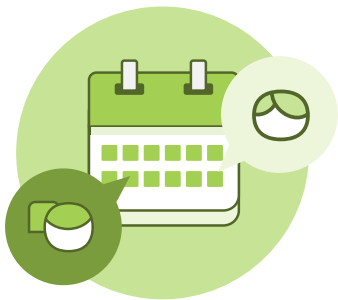
### HOW TO GET THE BEST OUT OF YOUR TEAM

- Look for people with similar mindsets but different skillsets.
- A hands-on mentality is essential. Your team members need to be able to depend on each other to maintain focus. A team where people feel they have to finish each other's jobs is destined to fail.
- Foster a positive attitude between team members. It all starts with a shared sense of the project goals. Discuss why you're working on this project, and how it will impact the business.
- Ask each team member about the specific processes and techniques they will use. Are the different methodologies aligned?
- Create a motivating work environment. Make sure everybody feels comfortable and be open to questions and out-of-the-box suggestions.
- Take some time away from the office and organize group activities to foster team spirit while blowing off steam.

# THE ESSENTIAL FEATURES OF A GREAT PROJECT MANAGEMENT TOOL

Keeping track of all the resources, phases, responsibilities and team members involved in a single project can be challenging. And if you're working on several projects at once, it can be downright overwhelming. Luckily, there's help available – lots of help. These days, tons of project management tools are clamoring for your attention. But what features should you look for?

A good project management tool helps you to centralise information while also enabling each co-worker to consult his or her tasks at any given moment. It offers insight into the distribution of the workload, and allows adjustments without losing focus.



## ► PLANNING

The planning tool is the very essence of your project management software. At the very least, it helps you keep track of all scheduled tasks and deadlines. A shared team calendar can be a great asset as well, just like automatic notifications when a deadline is approaching.

More sophisticated project planners let you distribute tasks and responsibilities to specific team members, giving you an even clearer picture of workload distribution and timing.



## ► TASK MANAGEMENT

Task management is another basic feature of most project management tools. A good task manager allows you to divide projects into larger milestones and smaller tasks to which you can add deadlines and budgets. More advanced tools even integrate the '[critical path](#)': the precise order in which tasks have to be completed to keep the project going forward.



### ► COLLABORATION AND COMMUNICATION

Swift communication is key to the success of any project – so it should be part of your project management tool as well. Well-designed project tools function as central hubs for basic data and detailed information. This positively affects in-house collaboration.

Some tools also facilitate the sharing of project information with customers. This can be an easy way to keep your client updated on progress without having to schedule a meeting every few days.

### ► REPORTING

Reports and statistics are great ways to gain insight into your business and learn from previous projects. Why did a project go over budget? Why did we miss a deadline? It's all there.

### ► BUDGET AND RESOURCE MANAGEMENT

Some tools offer a specific resource management feature. This gives you an overview of meeting rooms booked, planned and used resources and what all of this would cost. It's also useful to avoid double booking and resource shortages.

### ► TIME TRACKING

Time tracking features tell you which tasks took the longest to complete during a previous project, enabling you to better estimate costs and time in the future. Many tools offer basic time tracking, but the option to set different hourly rates and to automatically add invoiceable hours to your invoice could save you hours of work.





# CHECKLIST: WHICH PROJECT MANAGEMENT TOOL IS RIGHT FOR MY BUSINESS?

There is no 'one-size-fits-all' solution when it comes to project management tools. Not every business needs all of the available features. Finding out what works best for you and your team requires a little research. This checklist is a great starting point.

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## 1. How many people will be using the software?

- a 100 or more
- b 2 – 100 users
- c Less than 2

## 2. How important is data security?

- a Very important: my company deals with ultra-sensitive information
- b Moderately important: I don't want my business secrets out in the open
- c Not important

## 3. How important is integration with third-party apps like Google Calendar, Outlook and Chrome?

- a Very important: my company already uses a number of tools and I want to give my team a large degree of freedom as to what tools they use
- b Moderately important: a certain level of integration is needed to ensure that everything runs smoothly
- c Not important: the tool can work separately from other programs

## 4. What level of task management do you need?

- a I need to assign tasks to different team members and allocate resources
- b I need to be able to divide larger projects into milestones and tasks to track progress
- c I just want to be able to clear items off a simple to-do list

## 5. How important is document management and storage?

- a Very important: I want a secure, central location to keep all project-related files
- b Moderately important: I want to be able to centralise key project files, so team members can easily look up important information
- c Not important: I'm saving files in a different location

## 6. Do you need to be able to work remotely?

- a Yes: my team is geographically dispersed.
- b No: we all work under the same roof.



# RESULTS

### MOSTLY A:

You work in a large company and are looking for a complete business suite to take care of all your project management, CRM and business process needs. The most likely contenders here are Salesforce, Oracle and SAP.

### MOSTLY B:

You likely work in a medium-sized, project-based company. You require a host of features and agility, but resent the hassle of a business suite. Your best bet? An all-in-one CRM that combines agile project management with extreme usability.

### MOSTLY C:

Most likely, you work as a freelancer or in a very small company. To assist you in taking control of your project management, there are tons of helpful, free tools available. Trello and Wunderlist can get you a long way without you having to spend a dime.



## WHY NOT GIVE IT A TRY?

Ready to step up your project management game? With its unique Project Planner module, Teamleader is the ideal solution for project-based SMEs that want to increase focus and efficiency.

## KEY FEATURES



Extremely intuitive user interface



Dedicated project planner



Third-party integrations



Voice over IP



Time tracking

Go ahead: give it a try for free!

[START YOUR 14-DAY FREE TRIAL](#)

Or dive deeper:

[TAKE THE TOUR](#)