Project Management Essentials

Project management is defined by the Project Management Institute (PMI) [1] as the application of knowledge, skills, tools, and techniques to a broad range of activities in order to meet the requirements of a particular project. At some point, most professionals will find themselves responsible for managing a project. This could include something small like planning a meeting or implementing a state-wide initiative like Linking Systems of Care. While no two projects are alike in purpose, size, and scope, there are a set of best practices anyone can use to organize and manage resources to complete a project. Those best practices are formally documented in the field of project management, which organizes all projects into five phases:

1. conception and initiation;
2. definition and planning;
3. launch/execution;
4. performance and control; and
5. project close.

While this document lays out the five phases of project management in a linear fashion, many of the phases will overlap or run concurrently.

Five Phases of Project Management[2]

Phase 1: Conception and Initiation

These activities should be done before the project starts.

This phase of the project is critical and the success of the entire project depends on how well this phase is implemented. It is during this phase where the project's purpose and broad overarching goals are defined. This is typically done by the project's "executive sponsor." The executive sponsor is typically the person who has the overall responsibility for the project. The sponsor is usually a member of the executive leadership team for the organization who helps guide the project at the highest level. The sponsor will also commit to using his or her political and social capital to move the project forward when the project experiences delays, impasses, or other issues that threaten the success of the project.

This phase should involve an evaluation of feasibility, which may require a readiness assessment. This is important because it will determine if the project can or should move forward or if other work needs to be done before moving forward with the proposed project. If it is determined that the project should move forward, a project description/abstract should be developed that outlines why the project is necessary and its purpose. This will serve as the framework for developing the remaining phases of the project and ensuring that the project remains aligned with the initial goals.

This is also the phase to engage key stakeholders. Stakeholders are individuals who can affect or who are impacted by the issue, project or system the project is focused on.

Phase 2: Definition and Planning

These activities should be done before the project starts and revisited throughout the project.

This phase is where the road map for the project is developed. It should include every phase, from beginning to end, and all the smaller details for how each phase will be completed. It is during this phase where the following are developed:

1. Project Scope
2. Project Budget
3. Project Milestones/Objectives and Goals
4. Roles and Responsibilities
5. Workflow and Processes
6. Communication Plans

Together, these represent a comprehensive project plan that the project team can use to organize, manage, and execute the project. The project plan helps to ensure that the project maintains its scope and timeline, and remains within the established project budget. The project plan should be reviewed regularly to evaluate the goals, objectives, partners, and deliverables to determine if adjustments are necessary.

Project Timelines

While projects can be managed without a formal project plan, it is important to develop a clear, concise, and realistic timeline for the project. During this phase, the project leader should work closely with the key stakeholders to develop the project timeline, including the key project milestones. There are several project management tools on the market, and there are many free tools to assist in developing project timelines and deliverables tracking.

Project Scope

Defining the project scope is a key activity during this phase because it will be used as the benchmark for all other activities throughout the project life cycle. Project scope can be defined as the goals, overall tasks, deadlines, and budget for a project. The project scope will provide boundaries to operate within and guardrails to prevent the project from going off course. Everything done on a project is tested against the project scope and can be legitimately declined if it does not fit within the defined scope of the project.

Project Budget

Every project requires resources and those resources must be used efficiently, effectively, and be well-managed to ensure that the goal of the project is met. Understanding the budget constraints and limitations is a key factor in determining the scope and scale of the project. Creating a detailed budget can take considerable time and require input from various individuals, including external collaborators, so start early and be prepared for many rounds of revisions. Keep in mind, all this work will save you time, money, and could prevent other issues later.

Other Resources

Financial resources are not the only necessary resources. Staff, space, and equipment are three of the most critical non-financial resources. It is important to evaluate whether there are enough of these non-financial resources to support the size of the project. As part of the planning phase it is critical to evaluate the staffing needs or full time equivalent (FTE) hours needed to properly support the project. Completing this step can assist in selecting the individual to lead the project and ensure there is sufficient oversight. The same type of evaluation should be completed for the other non-financial project resources.

Phase 3: Launch or Execution

These activities are done after the project starts and revisited throughout the project.

The execution phase is the phase that everyone has been planning and waiting for. It is where the project begins and the actual tasks can be carried out by the project team. In

this phase, the project lead and executive sponsor move into the role of leading, coaching, and guiding the team.

During this phase, the project plan is an active, living, ever-changing document used to guide the process and manage the budget, deliverables, and communication with the team. In fact, the project plan should be reviewed with the entire team regularly. Regular check-ins allow the team to pivot where necessary, address issues quickly and adjust the plan in real-time before the project is placed in jeopardy. This can be done through weekly project team meetings, emails, or other communications to the team. The communication should include an update on the project's timeline, scope, and budget.

Phase 4: Performance and Control

These activities are done after the project starts and throughout the project.

This phase of the project focuses on measuring the project progression and performance to ensure everything happening aligns with the project management plan and runs in parallel with phase 3 of the project. The project lead is responsible for monitoring all aspects of the project and making sure that the project is running smoothly. During this phase, the project lead will closely monitor the following:

1. Project Budget
2. Project Timelines
3. Project Goals
4. Quality of the Deliverables
5. Team Performance

The communication plan created in the definition and planning phase will be relied on heavily during this phase as decision points arise. The communication plan should include a clear process on who can and should make decisions that will impact the major deliverables for the project. Typically, the executive sponsor is the person who makes these types of decisions and also decisions around budget, especially if it will result in the project going over budget.

Phase 5: Project Close

These activities are done near the end of the project or after the project is completed.

Once the project deliverables have been completed and accepted project closure can begin. It is common, for many reasons, for organizations to move from one project to another without properly closing a project down. The project closure phase has important steps to reflect, debrief, and celebrate.

Project Closure Meeting

Holding a project closure meeting is important to allow all members of the team to reflect on the project's successes, challenges, and future opportunities. This information can be valuable for informing future projects and to create a consistent process for closing a project within the organization.

Project Closure Report

The creation of a short 1-page project closure report is recommended as part of the project closure phase to provide a final document outlining the project. The following information is typically found in the project closure report, but can vary depending on the organization and the specific project:

1. Project Title/Name
2. State Project Goals
3. Project Start Date
4. Stated Project Deadline vs. Actual Date of Completion
5. Initial Project Budget vs. Actual Final Budget
6. Project Team Members and Roles
7. Project Stakeholders
8. Project Issues/Challenges
9. Project Successes
10. General Comments

Celebrate

If the project budget allows, plan a small celebration with the project team and key stakeholders over lunch or after work to acknowledge the hard work done by the team to get the project completed. If the budget does not include support for a celebration, find a creative way to celebrate the project. This can include sending a nice message to the team or a public acknowledgment of the project's success and a thank you to those who were involved in the project.

Project management best practices can be valuable and beneficial tools for projects of any size and scope. Organizations that are seeking frameworks to help organize, manage, and implement projects should consider using the above best practices keeping in mind that each organization is different.

Additional Resources:

For more information about project management and the best practices visit the following sites:

Project Management Institute: What is project management?

Project Management Institute: Best Practices – The Nine Elements to Success

Team Gantt: Project Management Best Practices Guide

[1] Project Management Institute
[2] Id.

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