



Project Management

GUIDE

Introduction

Project management software is a great help when managing any project. Numerous software is available, so choosing one that meets your project requirements is important.

This resource will enable you to:

1

Identify the main tasks for each project stage.

Successfully run projects by being aware of the different project stages and the main tasks to be completed.

2

Identify the key features that will be important to consider when choosing project management software.

Identify and categorize the features you should look for in project management software based on the needs and requirements of your own projects.

3

Evaluate and select software vendors.

Assess project management software vendors based on your project's needs and simplify the decision-making process.

Project Stages Overview

There are five different stages to go through in order to successfully achieve project goals. To better understand the features you will need in your project management software, you first need to understand what you want to deliver during each stage. Below, you will find the five stages of a project and a list of tasks to complete during each stage.

Tip

Communicate effectively. Keep stakeholders up to date, identify and solve issues, and request updates from the team regularly throughout the project's lifecycle.

Kickoff

1. Define goals and objectives
2. Define stakeholders
3. Define project scope
4. Assess resources
5. Create project charter

Planning

1. Plan project tasks
2. Arrange tasks by priority
3. Define budget

Execution

1. Allocate resources
2. Assign roles and responsibilities
3. Manage resources
4. Establish workflows
5. Build products/processes

Monitoring

1. Monitor project progress
2. Track costs
3. Identify, prevent, and solve issues

Closure

1. Review project deliverables
2. Deliver final product
3. Get project results approved
4. Evaluate team performance
5. Document lessons learned

1. Define project goals and objectives

- Write goals and objectives describing what the project is expected to accomplish and the value it will bring to the business.

- Project goals are usually vague statements and cannot be measured.

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Example: Improve and simplify the recruiting process for both recruiters and candidates

- Project objectives must be specific, measurable, achievable, realistic, and time bound (SMART).

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Example: Use automated tools (AI chatbots, premade assessments, and applicant tracking systems) to reduce the time to fill by 50% and bring the candidates that drop out down to 15% by the end of Q4.

2. Define stakeholders

- Identify those that are interested in your projects and can benefit from the project's success. Map each stakeholder individually.

- Sort your stakeholders into three categories: key stakeholders, primary stakeholders, and secondary stakeholders.

Analyze their interests, how likely they are to influence your project, how much power they have, and their attitude toward the project.

Focus especially on key stakeholders.



- Assess stakeholders according to three dimensions: power, interest, and attitude. In order to do this, you can use Mendelow's matrix and Murray-Webster and Simon's three-dimensional grid.

- Develop a personalized communication plan for each stakeholder based on their preferences, interests, and needs.

Download the stakeholder management playbook [📄 here](#).

3. Define project scope

- Write a project scope statement, including the size of the project, a summary of its goals and objectives, and the resources you will need to complete the project.

- Specify the issues that you need to address, the proposed solution, and the project start date.

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Example: The company's average time to fill is currently 45 days, and 25% of candidates drop out 30 days into the recruiting process.

To improve and simplify the recruiting process, the HR team has decided to implement automated tools.

The project will begin on October 1st, 2022.

- Write a business case explaining why the project is needed and the benefit that it will bring to the business.

- Specify project deliverables.

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Example: Reduce the time to fill by 50% and bring the candidates that drop out down to 15%.

4. Assess resources

- Evaluate the resources you will need to complete the project. Identify resources you already have available and resources that are currently unavailable for this project.

5. Create project charter

- Write a short document that lists the project's goals, objectives, scope, resources, deliverables, and stakeholders. Use the project charter to establish the authority of the project manager clearly.

1. Plan project tasks

- List the tasks that need to be completed to achieve the project goal. On some occasions, these tasks can also have subtasks.

Example:

- ☐ *Prepare copy for the chatbot.*
 - ☐ *Write copy*
 - ☐ *Proofread copy*
- ☐ *Design premade assessments for each role.*
 - ☐ *Meet with the role manager*
 - ☐ *Write assessment*
 - ☐ *Review assessment*
- ☐ *Conduct a vendor assessment for the applicant tracking system.*
 - ☐ *Establish vendor criteria*
 - ☐ *Research possible vendors*
 - ☐ *Interview selected vendors*
 - ☐ *Assess vendors*

- Identify those tasks that will be milestones during the project's lifecycle. Setting milestones is useful for measuring the project's progress as the team works toward a common goal.

- Create a project timeline and assign a duration for each task. You can use a Gantt chart in order to visualize when each task begins and ends and the amount of time it should take the task owner to complete the task.

2. Arrange tasks by priority

- Evaluate the importance of each task and plan which tasks should be completed in what order. Take dependencies as well as resource availability into consideration.

You can use the Eisenhower matrix to sort tasks into categories based on their urgency and importance. The Eisenhower matrix is a useful way to visualize project tasks that are urgent and important, urgent but not important, not urgent but important, and neither urgent nor important.



	Urgent	Not urgent
Important		
Not important		

3. Define budget

- Design a project budget by estimating the costs of each one of the tasks that need to be completed to reach the project goal. It is important that you understand the costs of your project and the different variables before you begin designing a budget.

These are some best practices for budget design:

- ✓ Establish a budget for a period or for certain periods of time depending on how long the project is expected to last.
- ✓ Take into account how much will be spent on each task and when.
- ✓ Separate needs from wants.
- ✓ Review past budgets for other projects.

- ✓ Use your most recent data to make well-informed decisions.
- ✓ Plan for best- and worst-case scenarios.

- Present your budget in a clear report using realistic numbers. Illustrate how the budget aligns with the project goals. This will make your budget more likely to be approved.

- Get your budget reviewed and approved before moving on to the next stage in the project lifecycle.

1. Allocate resources

- Evaluate the resources you have available based on your approved budget, the project timeline, and the project needs. When you are allocating resources, take into account:
 - ✓ The tasks and subtasks that need to be completed.
 - ✓ Deadlines.
 - ✓ Task dependencies (if there are any).
 - ✓ Required skillset.
 - ✓ Talent availability within the team.
 - ✓ Skill gaps.

- Consider all the data you have gathered to make well-informed decisions about the talent you will need to complete the project tasks.

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Example: This project needs a senior analyst with experience in the implementation of applicant tracking systems. We have identified this as a skill gap. After reviewing our budget, we have decided to hire a professional that can bring these skills.

2. Assign roles and responsibilities

- Assign roles and responsibilities evenly among team members based on the project timeline and needs and their skillset, experience, and availability.

By assigning each member certain tasks, you are encouraging them to stay focused and motivated on a personal goal that, once completed, will bring the team one step closer to achieving the project's main goal.

- Use a project management tool to assign specific tasks to each team member. Make due dates and dependencies clear.

- Encourage team members to use the tool to track their own progress regularly so that everyone can have access to up-to-date information about individual tasks and overall project status.

3. Manage resources

- Manage the workload of everyone involved in the project.
- Use a Gantt chart and tracking tools to:
 - ✓ Follow project progress in real time.
 - ✓ Measure productivity.
 - ✓ Predict more accurately how long future tasks will take.
 - ✓ Pinpoint any over or underperforming employees.
 - ✓ Identify and prevent or solve issues.
 - ✓ Change priorities and reassign tasks as needed.
 - ✓ Ensure the efficient use of resources.
- Hold status meetings regularly to provide and receive updates on the progress of the different project tasks.

Ensure team members know what to expect from these meetings and how to prepare for them so as to make good use of everyone's time.
- Encourage and support team members in learning and developing project management skills such as planning and proactive issue resolution so they can effectively manage their tasks within the project.

4. Create workflows

- Create workflows where you can visualize the step-by-step process to complete a task. This will be useful to onboard new joiners to the project more quickly, and it will also be a good quick reference guide for team members to consult.

5. Build products/processes

- Work with your team to complete all the tasks and subtasks within the established deadlines to achieve the project goal.

Monitoring



1. Monitor project progress

- Monitor team activity and project progress to ensure that all deadlines are being met, all tasks are being completed, and that all your resources are being put to use. By monitoring project progress, you will also be able to identify resource availability and skill gaps easily.
- Ensure everyone is playing their part by regularly reviewing task statuses. Reallocate efforts and reassign tasks as needed.

2. Track costs

- Track and control project expenses in real time to make sure that you are within the approved budget.

Always discuss budget issues with those concerned and get the necessary approval before making any decisions.

3. Identify, prevent, and solve issues

- Use real-time tracking tools to predict and anticipate risks and possible delays, as well as prevent and solve issues. Use all the information gathered from the different tracking tools to make well-informed decisions.

1. Review project deliverables

- Determine if project goals have been achieved and evaluate the quality of the work that has been produced by the team. Ensure quality before delivering the product.

2. Deliver final product

- Deliver the final product to the appropriate stakeholders for their review and approval.

3. Get project results approved

- Get project results approved by stakeholders before project sign-off.

4. Evaluate team performance

- Evaluate each team member's performance and ask team members to do a self-evaluation of their contributions to the project as well.

- Have a feedback interview with each team member to discuss their performance and go over what they have done well, what they could do better, and what they can do next to improve their performance for future projects.

- Discuss key takeaways with each team member.

5. Document lessons learned

- Write a report with lessons learned from this project that can be used as guidance for future projects.

Take into account:

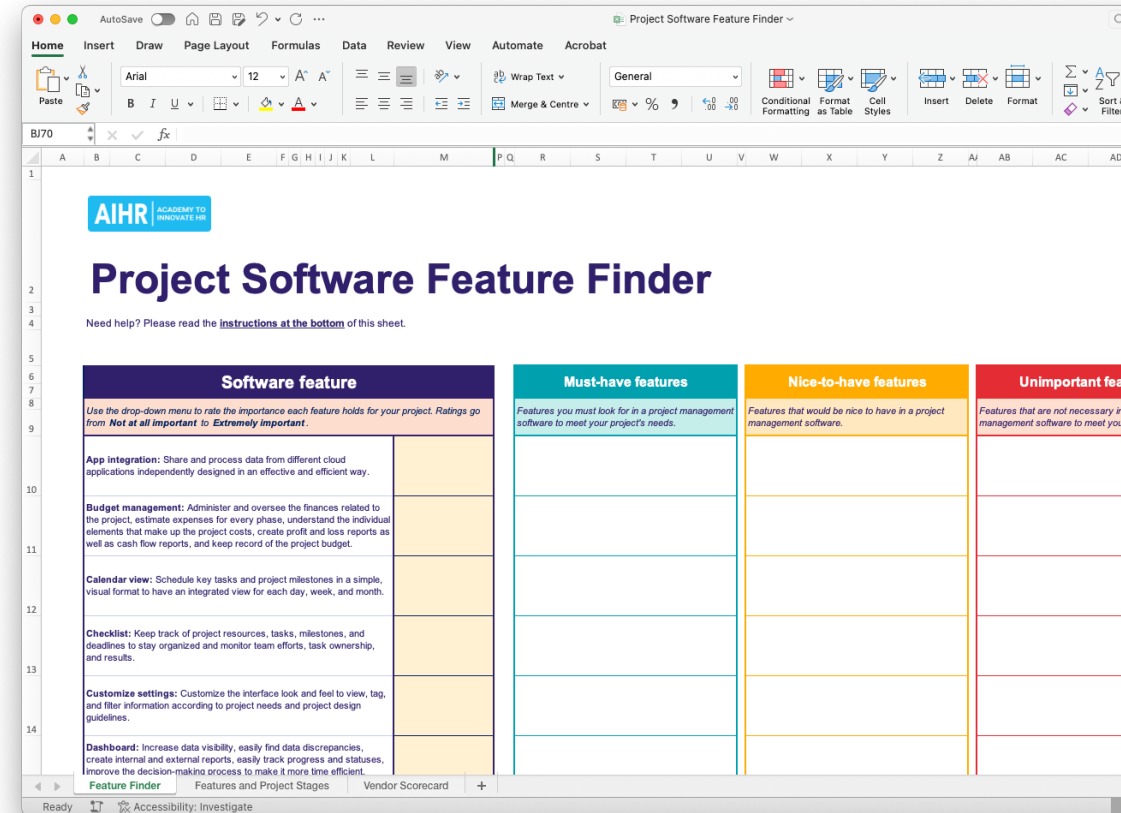
- ✓ The project strengths.
 - ✓ The project weaknesses.
 - ✓ What was initially expected from the project.
 - ✓ What was actually achieved by completing the project.
 - ✓ What worked well and why it worked well.
 - ✓ What did not work well and how it could have worked better.
 - ✓ What needs to change in the future in order to achieve better results.
 - ✓ What steps should be taken in order to see those changes.
- Share the lessons learned report with the appropriate stakeholders.

Project Software Feature Finder

Project management software is useful for organizing a project's scope, assigning tasks and subtasks, tracking progress and ownership, communicating and collaborating effectively with team members and stakeholders, writing internal and external reports, and making informed decisions or changes as needed.

The feature finder is a very useful starting point for selecting project management software. This resource will enable you to:

- Rank features based on your project's needs.
- Map features to project stages.
- Assess and evaluate vendors.



Download the Project
Software Feature Finder

