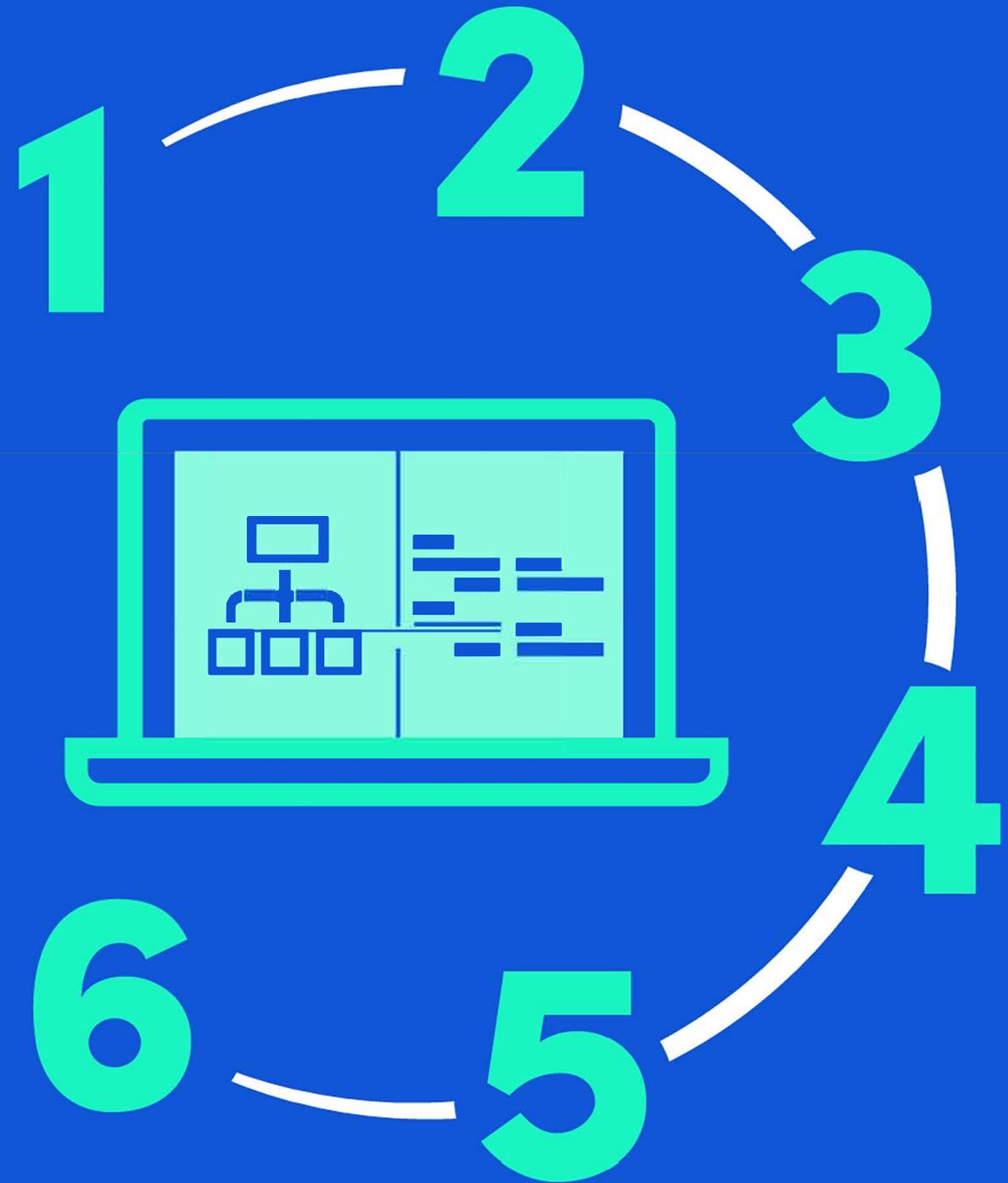


# THE SIX STEP GUIDE TO PRACTICAL PROJECT MANAGEMENT



“If you’re looking for some real-world guidance, then The Six Step Guide to Practical Project Management will help you get started.”

Dr Andrew Makar, Tactical Project Management

# PROJECT MANAGEMENT FOR EVERYONE

**If you think managing projects is too difficult, think again. We've stripped back project management processes to the basics – to make it quicker and easier, without sacrificing the vital ingredients for success.**

Every day, people are handed projects to deliver. Those people may not have been given much, if any, project management training, and have to juggle lots of other work from their day job. They may end up cutting corners.

Is that you? Or are you a manager who is trying to get your team of non-project managers to adopt consistent processes?

Either way, this guide will help. We've stripped back professional project management processes to the absolute basics. We've made the process simpler and quicker, without sacrificing the vital ingredients for a successful project – to hit your deadlines, stay in cost and deliver big benefits to your organisation (and career).

In fact, we've gone one further. Often, people think they need to use an overly complex project management tool that requires lots of training. Or they end up using something that may be close to hand (such as a spreadsheet or a word processor) but just isn't up to the job.

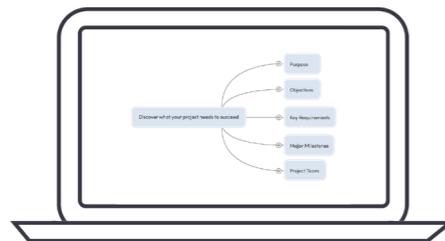
As well as giving you a simple process, we'll also give you a chance to go ahead and apply what you've learned in practice with templates and guides using our simple project management tool – MindGenius. So, when it comes to getting the job done quickly and easily, there's nothing stopping you.



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The rest of this guide will go into more depth on each of the six steps, but here is a quick summary of what's coming up.



### GO AHEAD AND DO IT

Once you've read about the steps, you can go ahead and run a project. You can try out MindGenius for all these steps. Download a free trial and templates to help you run a project from start to finish.

[Download the trial and templates](#)

1

## DISCOVER WHAT YOUR PROJECT NEEDS TO ACHIEVE

Understand why your project exists (its purpose) and its objectives. This will guide your decisions throughout the project.

2

## FIND OUT WHO IS INVOLVED AND WHAT THEY WANT

Identify your stakeholders and gather their requirements. Benefit from the collective knowledge of the team.

3

## DECIDE ON WHAT YOU NEED TO DELIVER

Create your scope document and present it to your stakeholders in a meeting. Get everyone on the same page and collect vital feedback.

4

## SCHEDULE THE TASKS

List your tasks, find out how long they will take, assign them to people and get a realistic finish time. Visualise your timeline with a Gantt chart.

5

## MANAGE THE WORK AND COMPLETE THE PROJECT

Monitor progress, report on the status and deal with any changes. Keep on top of everything and keep stakeholders in the loop.

6

## LEARN LESSONS

Run a retrospective meeting to learn lessons from the project. It's a valuable opportunity to identify improvements.

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# PROJECT MANAGEMENT DOESN'T HAVE TO BE COMPLEX OR INTIMIDATING



**Dr Andrew Makar of Tactical Project Management, who has 15 years of experience as a PMP-certified project manager and of leading non-project managers, says people today don't have time for overly complex processes**

“ Many people are entrusted with the mantle of ‘project manager’, often regardless of whether they are interested in the role. There is an entire industry aimed at the project management profession with hundreds of thousands of certified project management professionals, yet projects get delivered every day, with and without certified project managers.

Don't get me wrong, I'm Project Management Professional (PMP) certified and actually enjoy a healthy discussion on proper project management processes. However, project management doesn't have to be overly complex or intimidating, as described in project management textbooks.

One of the best executives I ever met prided himself on *not* having PMP certification, yet he was responsible for his organisation's enterprise programmes and projects.

He acknowledged that project management processes, tools and techniques were important, but just as vital are communication and common sense. He trusted his team to pick the right tool for the job and adjust the processes to meet the project needs.

People don't have time today for overly complex processes producing reams of documentation and checklists. They need to deliver projects, not paperwork.

The project management industry provides processes and techniques to improve project quality. However, these need to be adjusted to fit your project.

If you've inherited the mantle of ‘project manager’ and are looking for some real-world guidance, then the *The Six Step Guide to Simple Project Management* will help you get started. After all, you've got projects to deliver.

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# STEP ONE

**DISCOVER WHAT  
YOUR PROJECT  
NEEDS TO ACHIEVE**



## STEP ONE: DISCOVER WHAT YOUR PROJECT NEEDS TO ACHIEVE

**When you've been given a new project to manage, there are some essential pieces of top-level information you'll need at the very start of the process.**

This information will:

- Ensure you understand what is expected of you
- Help you make the right decisions throughout the project
- Explain the project to stakeholders and set their expectations

You'll need to define the following:

### **Purpose**

You need to understand the reason for the project, such as the problem it aims to solve or the benefits it will bring, as well as what you will deliver to achieve this.

### **Objectives**

You will need to list the project's outcomes – what you want the project to have achieved after it is delivered.

### **Key requirements**

You'll need to identify the top-level requirements under the three headings:

- **Scope:** What should the project deliver?
- **Time:** Is there a date this needs to be delivered by?
- **Cost** (or resources): What's the budget? What personnel are available?

You should also find out which are flexible: can either the scope, timeline or cost be changed? Or is there one which should be fixed?

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Your purpose and objectives will act as your 'guiding light' throughout the project. You'll need to refer to it regularly to make sure you're making the right decisions, so you should make sure that they are clear and specific.

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## STEP ONE: DISCOVER WHAT YOUR PROJECT NEEDS TO ACHIEVE

### Major milestones

As well as recording the start date, you should also record the end date you should aim for, only if you know it at this stage, as well as any other key deadlines.

### Project team

You should find out at this stage who is available to help out with the tasks that will be needed to deliver the project.

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“ I remember working on one project where the running joke was that the project had launched, yet the project charter [as project start-up documents are often called] was “almost ready to be signed”. It consisted of a 45-page Word document that no one would ever read in great detail or even sign off. The project still delivered on time and was successful. This example begs the question – was all that process really needed?

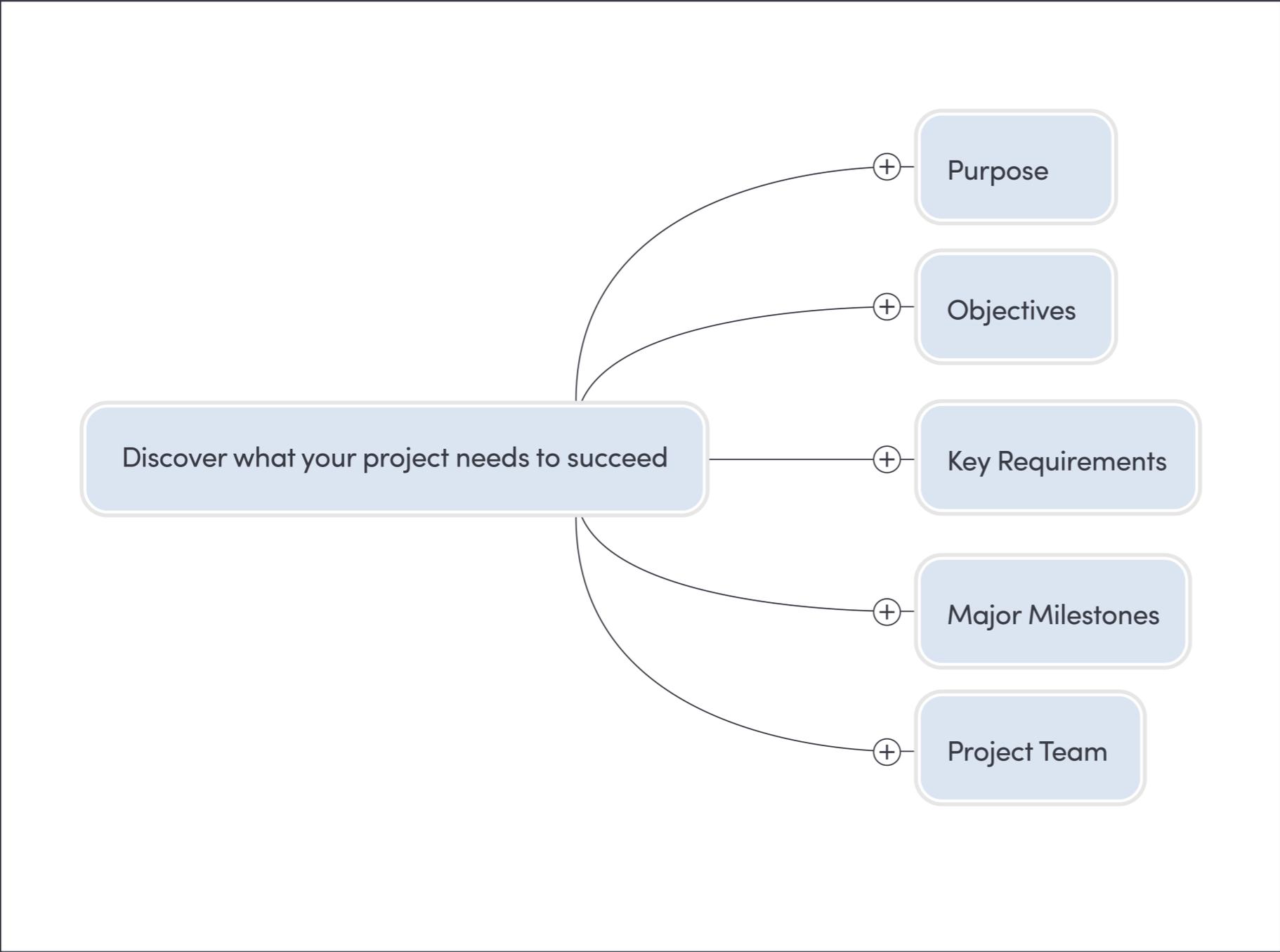
Dr Andrew Makar, Tactical Project Management

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# STEP ONE: NOW DO IT (FREE TEMPLATES)



## Discover what the project needs to achieve (and more)

You've learned all about the first step of project management: finding out what the project needs to achieve. Now you can go ahead and do it in real life.

We've provided you with a free template to allow you to document the information you need.

It's part of the package of templates that accompany this guide, which will help you put what you learn into practice.

[Download the trial and templates](#)

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## STEP TWO

**FIND OUT WHO  
IS INVOLVED  
AND WHAT  
THEY WANT**



## STEP TWO: FIND OUT WHO IS INVOLVED AND WHAT THEY WANT

**The success of your project is not just about following the right process, it's also about involving the right people in the process.**

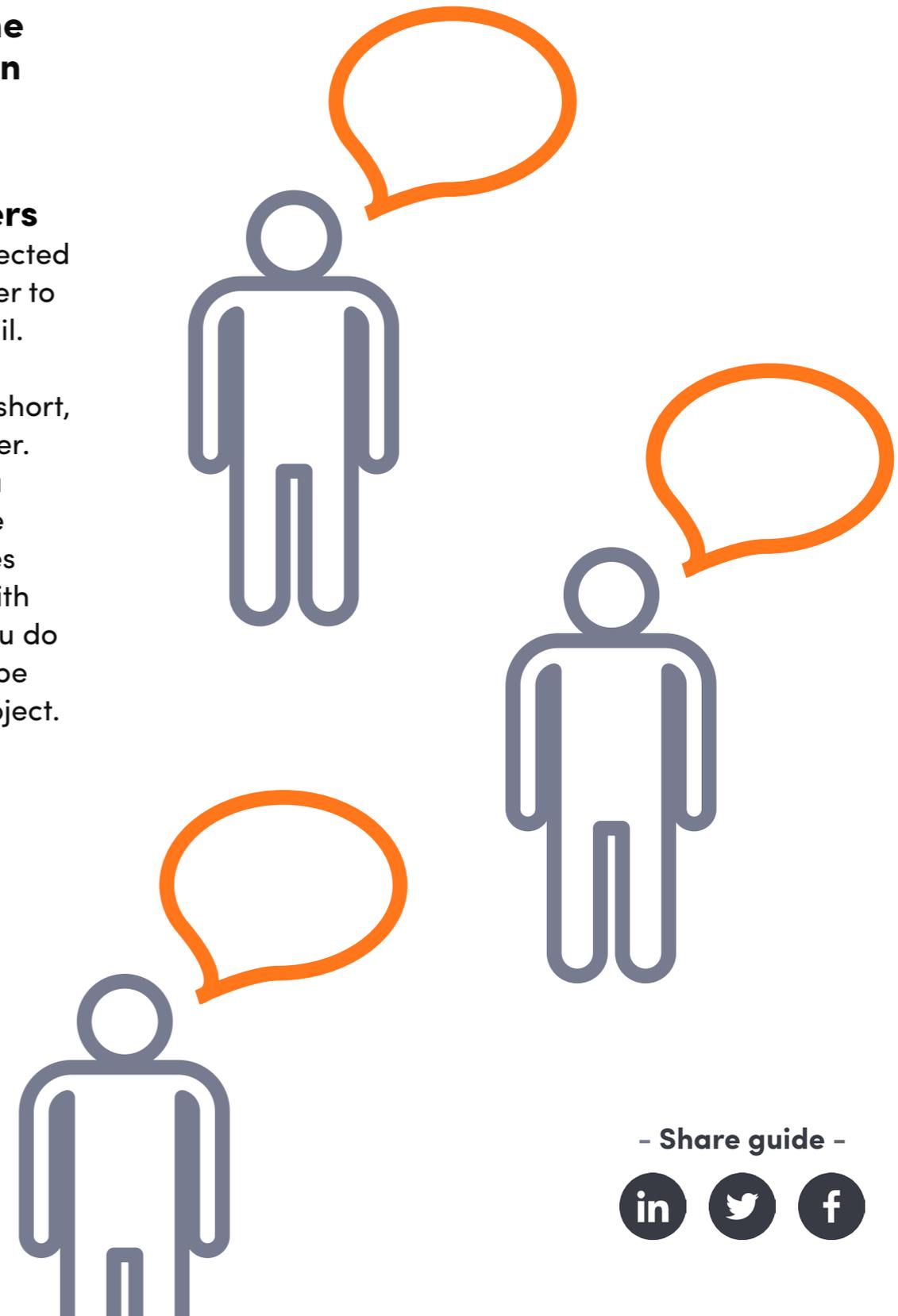
These people are your stakeholders and they have valuable input – information, insights, views and a fresh perspective. In other words, they can play a vital role in making sure you don't miss anything important.

It's also important that you keep them on side, so they support your project rather than block progress.

### **Identify your stakeholders**

You need to find out who is affected by your project or has the power to make the project succeed or fail.

Sometimes the list will be very short, and other times it may be longer. And sometimes it may take you a few minutes of thinking alone to make the list, and other times you may need to brainstorm with colleagues. But it's vital that you do it. Leaving someone out could be seriously damaging to your project.



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## STEP TWO: FIND OUT WHO IS INVOLVED AND WHAT THEY WANT

### **Find out what they need**

Once you've identified your stakeholders, you need to talk to them, to find out what they need from the project (their requirements).

Each stakeholder may need the project to do different things and will be able to offer different expert insights.

There are many ways you can get their input. The most valuable is the meeting – where you get all the stakeholders together in the one room to brainstorm. It's a chance to benefit from the collective knowledge of your organisation in the one session.

Failing that, you can also conduct interviews. This gives you a good depth of information, but it takes more time. You may want to prioritise the most important decision makers and subject experts for this.

The least engaging method of all is email – only to be used as a last resort or for low-priority stakeholders.

It's crucial that you are as comprehensive at this stage as possible. Anything you miss here may derail the project later on.

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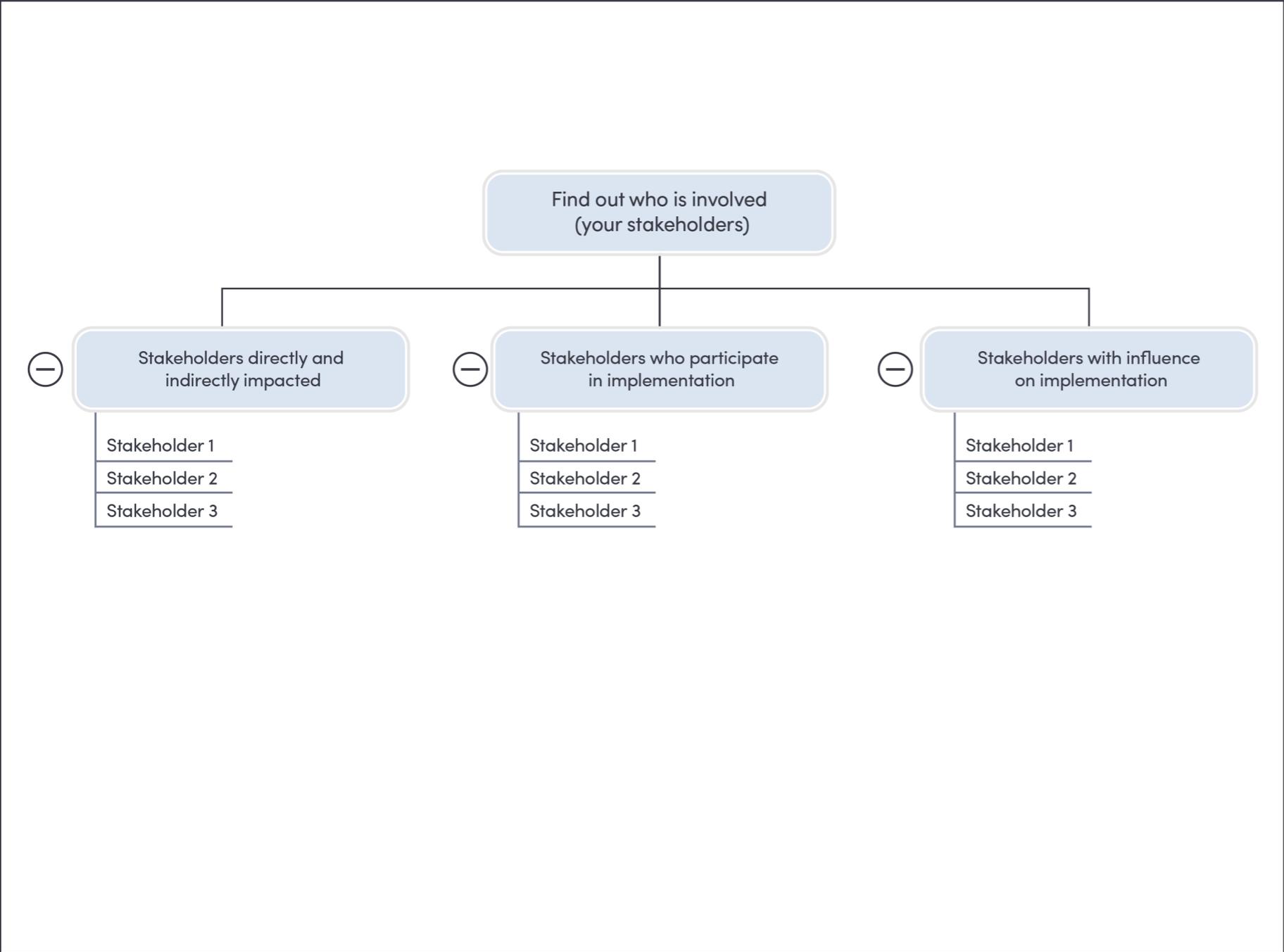
By recording information in sessions using the right software, you'll save time and energy from retyping (and making sense of hastily written notes), compared with using whiteboards or post-it notes. You can use MindGenius for this – it's easy to capture information quickly. By using a projector or big screen, everyone can see the information you capture, and you can even start to group and analyse the information in collaboration with stakeholders, saving you even more time.

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# STEP TWO: NOW DO IT (FREE TEMPLATES)



## Find out who is involved and what they want (and more)

You've found out that it is critical to find out who your stakeholders are, so you can ask them about their requirements.

We have a template for you that will allow you to do just that. In fact, we have a range of templates that accompany this guide, which you can use with a free trial of MindGenius.

Download a free trial of the software, as well as all the templates that accompany this guide.

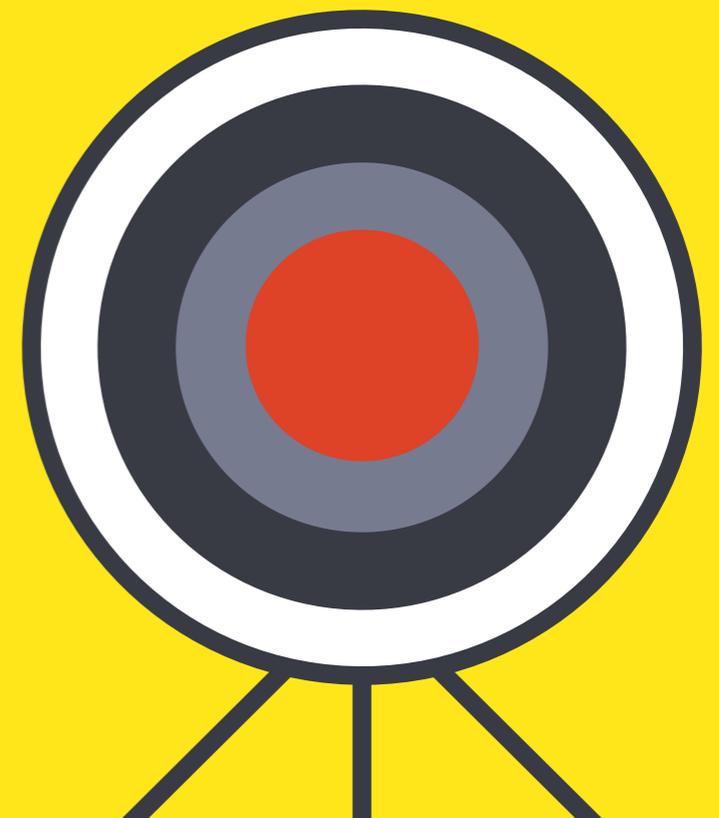
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# **STEP THREE**

**DECIDE ON  
WHAT YOU NEED  
TO DELIVER**



## STEP THREE: DECIDE ON WHAT YOU NEED TO DELIVER

**One big reason projects fail is due to the fact that what the project will deliver has been poorly defined and not effectively communicated to stakeholders.**

You need a crystal clear idea of this, so you know what you need to achieve, you can measure your progress and your stakeholders know what to expect.

### **Create your scope**

Once you've gathered all your requirements, you need to then translate these into what your project will deliver (the deliverables) to meet those requirements.

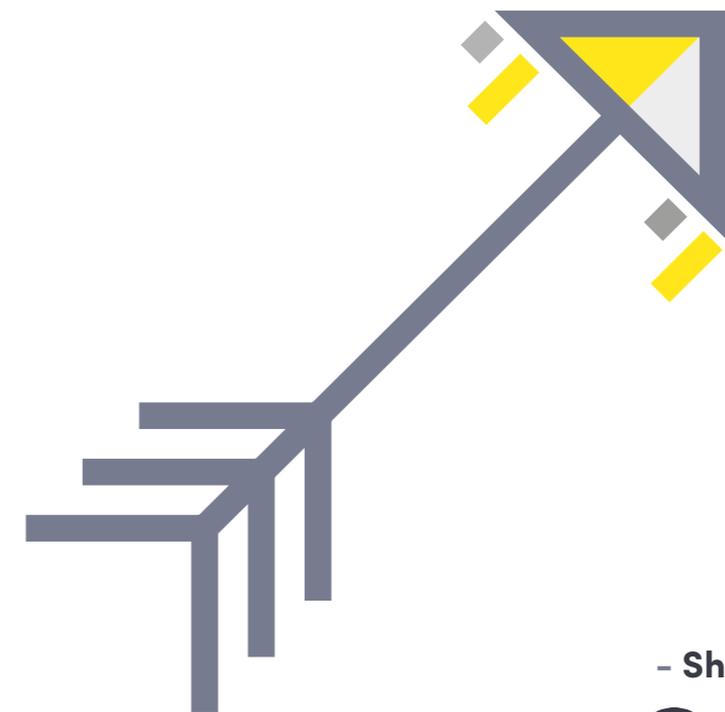
The list of deliverables is typically called a scope – which sets out the boundaries of your project.

Make sure your deliverables are clear, to avoid stakeholders being disappointed that their interpretation of the deliverables doesn't match the reality.

### **Get agreement on the scope**

You should get your stakeholders together in a meeting, to ensure they all understand and agree. Make sure nothing is hidden – which can happen if you just hand someone a document (people can miss things). Your goal is absolute clarity, and to get valuable feedback.

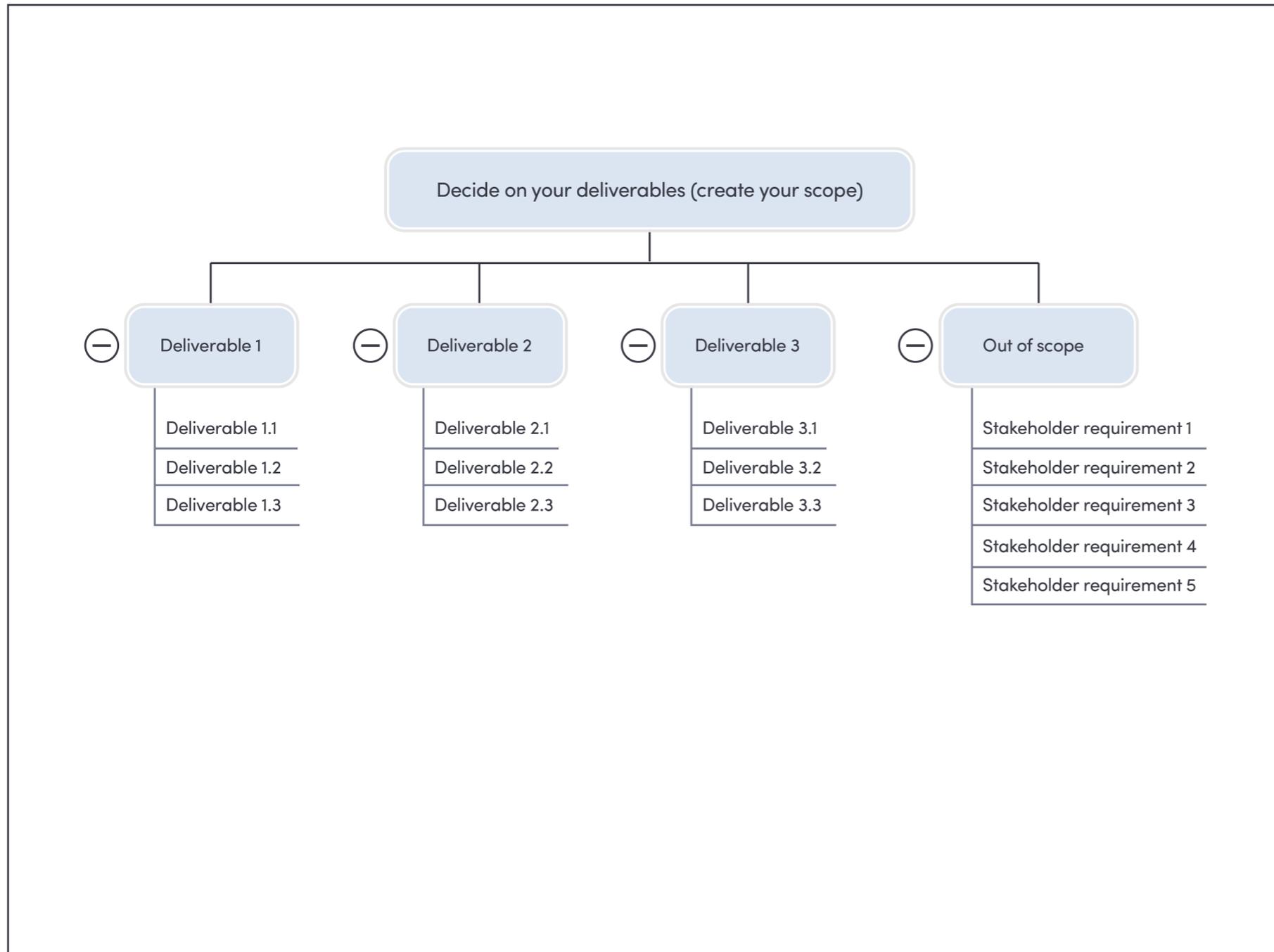
Present the scope visually and talk through each part (MindGenius is great for this – feel free to give it a try). It gives stakeholders the opportunity to spot gaps and to allow you to ensure that they don't miss or misunderstand anything.



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## STEP THREE: NOW DO IT (FREE TEMPLATES)



### Decide on what you'll deliver (and more)

You've read about the need for creating a scope, which outlines what the project will deliver.

Now, you can go ahead and create your own scope document using MindGenius and a helpful template (just one in the pack of templates that accompany this guide).

Download a free trial of the software, as well as all the templates that accompany this guide.

[Download the trial and templates](#)

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# STEP FOUR

# SCHEDULE THE TASKS

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## STEP FOUR: SCHEDULE THE TASKS

**One of the most common mistakes an inexperienced manager of projects makes is being overly optimistic about when the project can be delivered.**

What may seem a reasonable timeframe may turn out to be wildly ambitious. You will only know what is realistic when you create an estimate of how long your tasks will take with the personnel at your disposal, to give you a more accurate completion date.

### **List, estimate and assign your tasks**

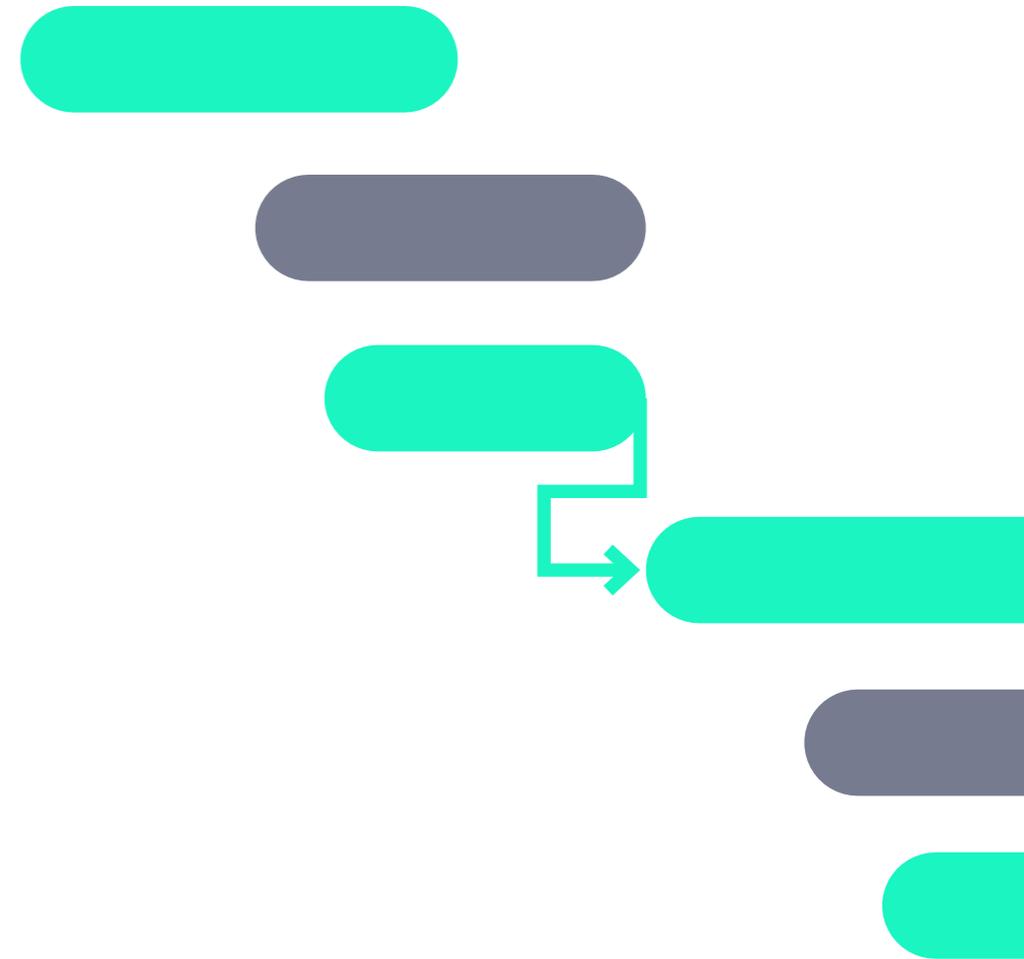
Once you have approval from your stakeholders on what your project will deliver, then you can start to list the tasks needed for each deliverable.

For each task, you should estimate how long it would take. Then, you should assign that task to someone – whether that's you or one of your team.

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If you use a tool such as MindGenius, you can create and adapt your Gantt chart quickly and easily. By adding dates to each of your tasks you then unlock the ability to automatically turn your map into a Gantt chart. It is easy to adapt, for example, if you need to change the dates or sequence of tasks. You can also assign people to tasks.

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## STEP FOUR: SCHEDULE THE TASKS

### Visualise your timeline with a Gantt chart

Gantt charts are an ideal visual way to see your project schedule clearly.

Creating your Gantt chart starts with arranging the tasks into a logical order and including the durations for each. You can then link the tasks – does one need to be completed before another starts?

You may find that some tasks don't depend on others and can be done anytime and that sets of tasks can run in parallel with other sets. This can shorten the project's overall timeline.

You then need to look at whether the people who have been assigned tasks are either under or over allocated. For example, you may need to move the schedule or reallocate work if you have two tasks for the one person at the same time.

Because you have the durations for each task, and those are in the right sequence and position, this now gives you your plan and estimated delivery date.

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Try using MindGenius for your project schedule. Download a free trial of the software, as well as the templates that accompany this guide.

[Download the trial and templates](#)

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“

If the project management tool you use isn't flexible with scheduling, the project manager can spend hours, if not days, trying to tweak the schedule to fit the project management tool constraints. For one project, I spent more time allocating project team resources to high-level tasks in a meaningless project schedule just so everyone could record time. I maintained a separate schedule for all the real project tasks, but needed to do duplicate administration in a separate system.

Project management just doesn't have to be this hard.

**Dr Andrew Makar**

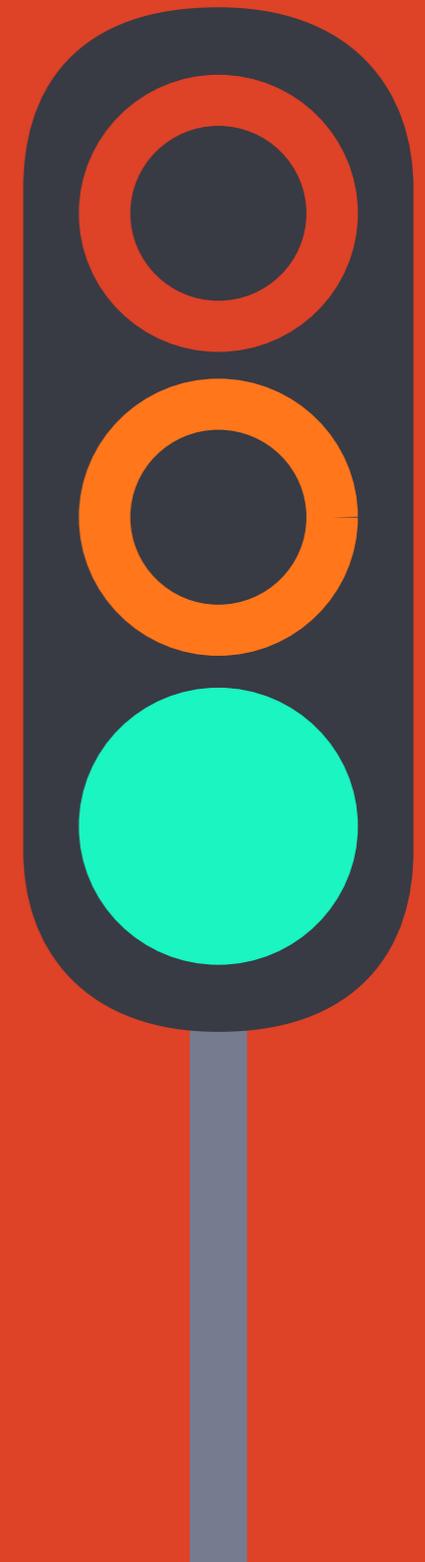
Tactical Project Management

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## **STEP FIVE**

**MANAGE THE  
WORK AND  
COMPLETE THE  
PROJECT**



## STEP FIVE: MANAGE THE WORK AND COMPLETE THE PROJECT

**Everything's planned, your stakeholders are happy, the work is scheduled and the people are assigned to the tasks. That can only mean one thing – that you are ready to deliver your project.**

The only way it will happen is paying close attention to progressing each task. Then, before you know it, you've delivered what you said you would.

### Monitor the progress

Make sure you are on top of your tasks and if other people have tasks, check with them regularly to make sure they are on track. Pay attention to your milestones, such as the completion of a phase or deliverable.

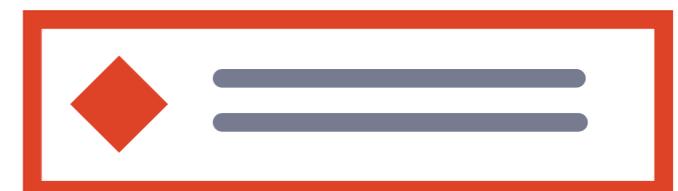
If you or other team members are encountering problems, make sure you address them as soon as possible, to minimise any delays.

### Report on the status

Whether weekly or monthly, you may need to report on progress to key stakeholders – such as your boss.

You should only be reporting on the highlights – the top level deliverables or milestones. A colour-based system can help:

- **green** for 'everything is great and we are on schedule',
- **amber** as a warning (but stakeholders don't need to panic – the projects team is dealing with it)
- **red** for 'there is a problem and you need help from the wider stakeholders to resolve the issue'.



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## STEP FIVE: MANAGE THE WORK AND COMPLETE THE PROJECT

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“ If you follow all the steps in this guide, then your project will do much more than cross the finish line.

Derek Jack,  
co-founder of MindGenius

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### Deal with any changes

With the best will in the world, changes are inevitable. And, even if you've done everything right when planning, you may encounter unforeseen problems or spot opportunities – and responding to these will have an impact on your project.

You may need to draft in more people to help, reduce what your project will deliver or you may have to accept that the project will run late. Crucially, you should let your key stakeholders know and get their approval.

### Complete the project

Once the last task is complete, and you've delivered everything that is expected, then the project is complete. Remember to congratulate yourself and the team on the big achievement.

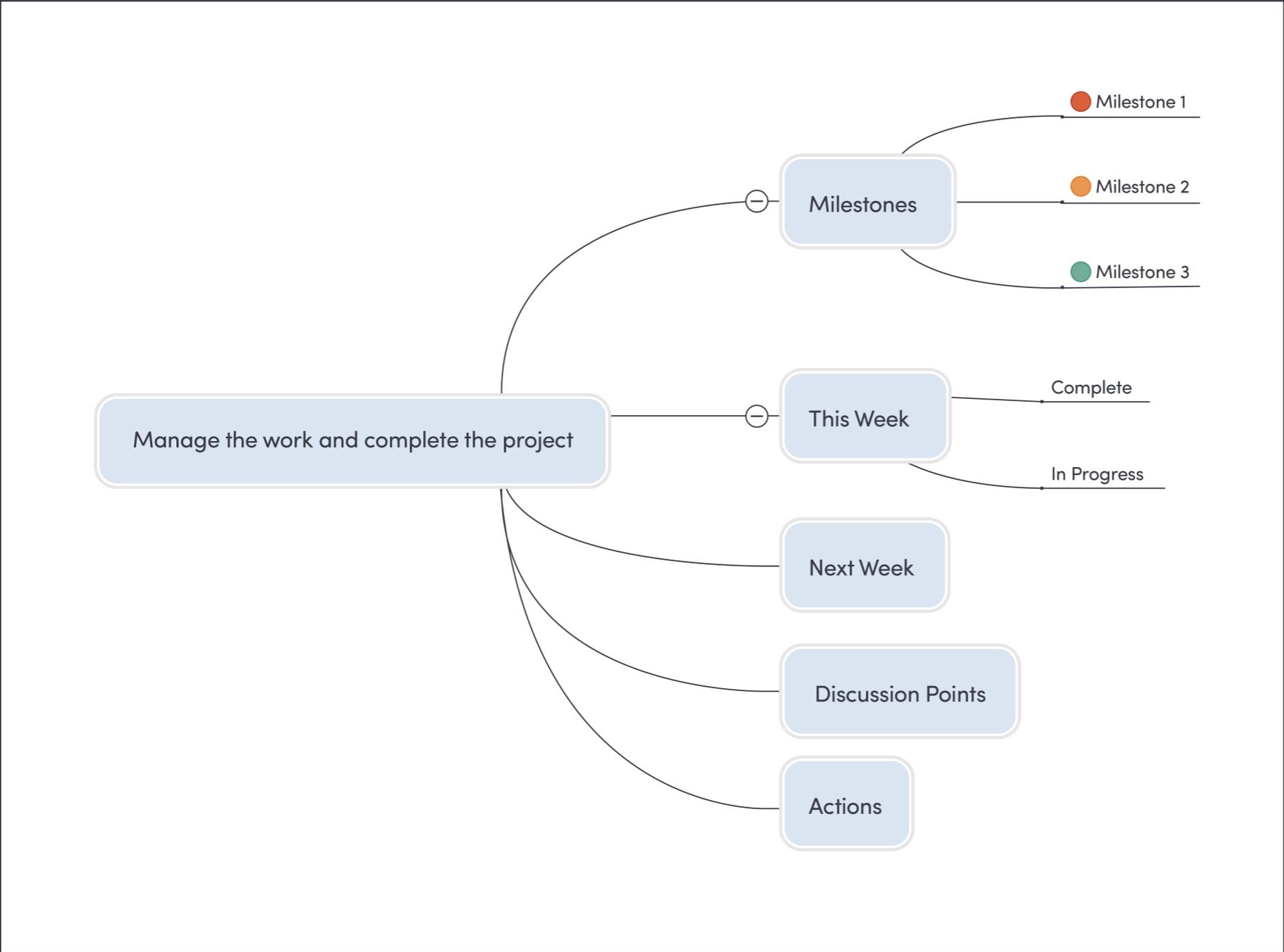
Derek Jack, co-founder of MindGenius, said: “If you've followed all the practical steps in this guide, then your project will do much more than cross the finish line. Your organisation will see big results and you, your team and the project will be judged a success.”

The end of the project isn't the end of the story though...

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# STEP FIVE: NOW DO IT (FREE TEMPLATES)



## Manage the work and complete the project (and more)

Delivering a project, as you've read, is about keeping on top of tasks, reporting status and dealing with changes.

We have a template that will help you with all of that. It's part of a pack of templates that will help you with the other stages too. And you can get free access to MindGenius to use them.

Download a free trial of the software, as well as all the templates that accompany this guide.

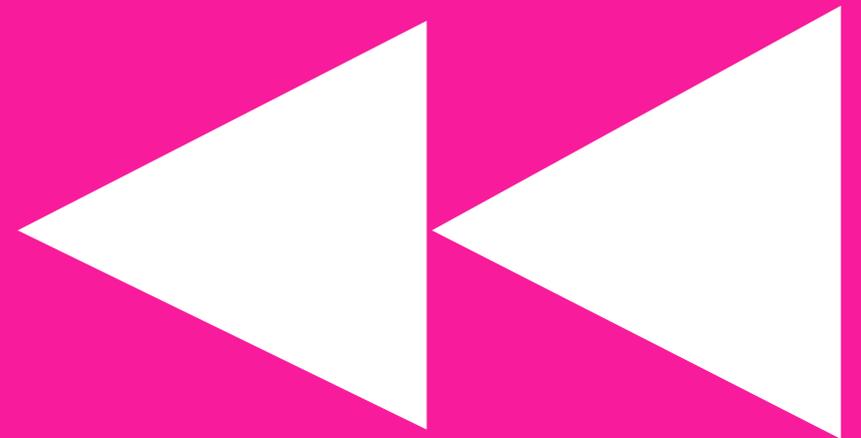
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**STEP SIX**

**LEARN LESSONS**



# STEP SIX: LEARN LESSONS

**When the last tasks have been completed, and the project has been delivered, that's often the end of the story. But it shouldn't be.**

Whether the project was a success or not, there will always be lessons to learn for the next time.

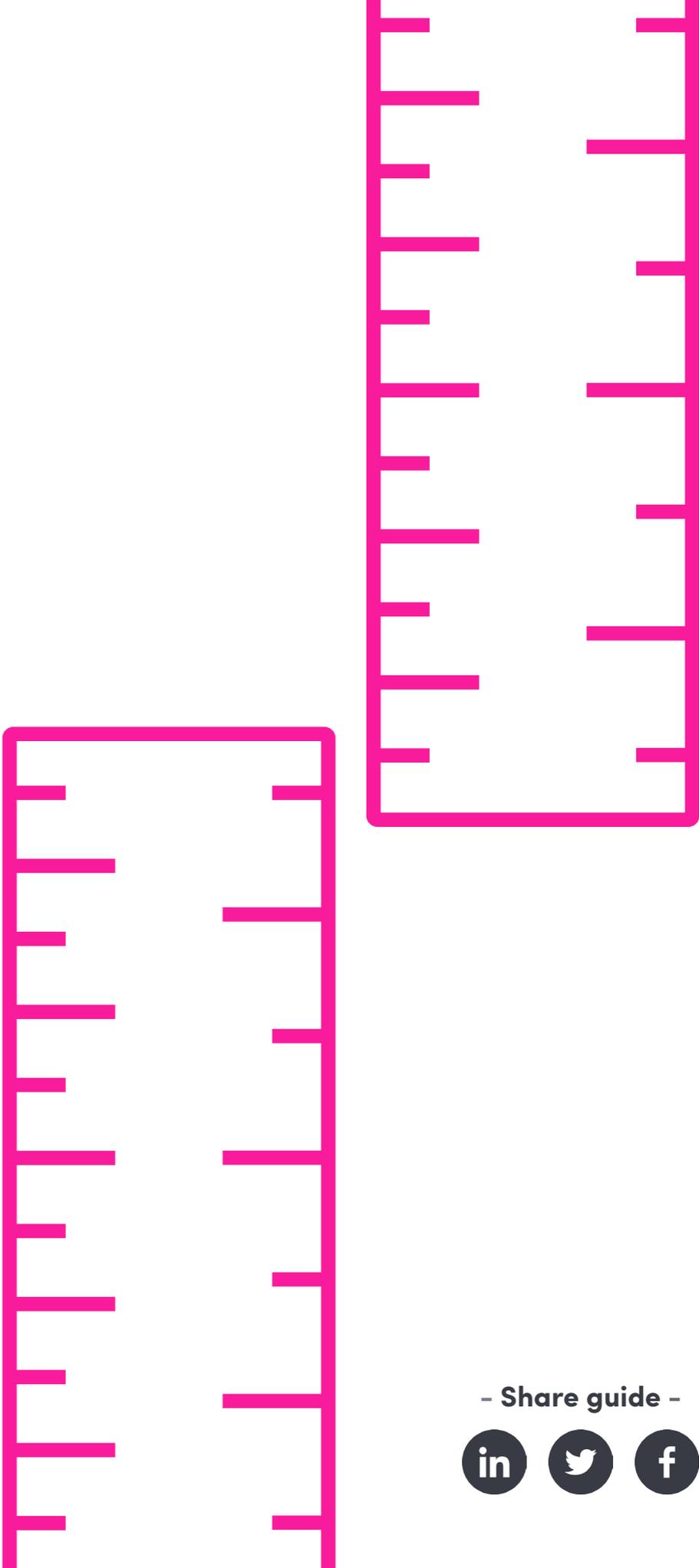
It's human nature to want to move on once something is finished, but failing to review the project means you will end up repeating the same mistakes again and again, even on very different projects.

Lessons learned sessions (or retrospectives), to identify what went well and what did not, can be done at various stages throughout the project or, at the very least, as a final review.

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Make sure you act on the information from the retrospective, rather than let it gather dust. At the very least share the information with the rest of the organisation so they can apply those lessons to their projects.

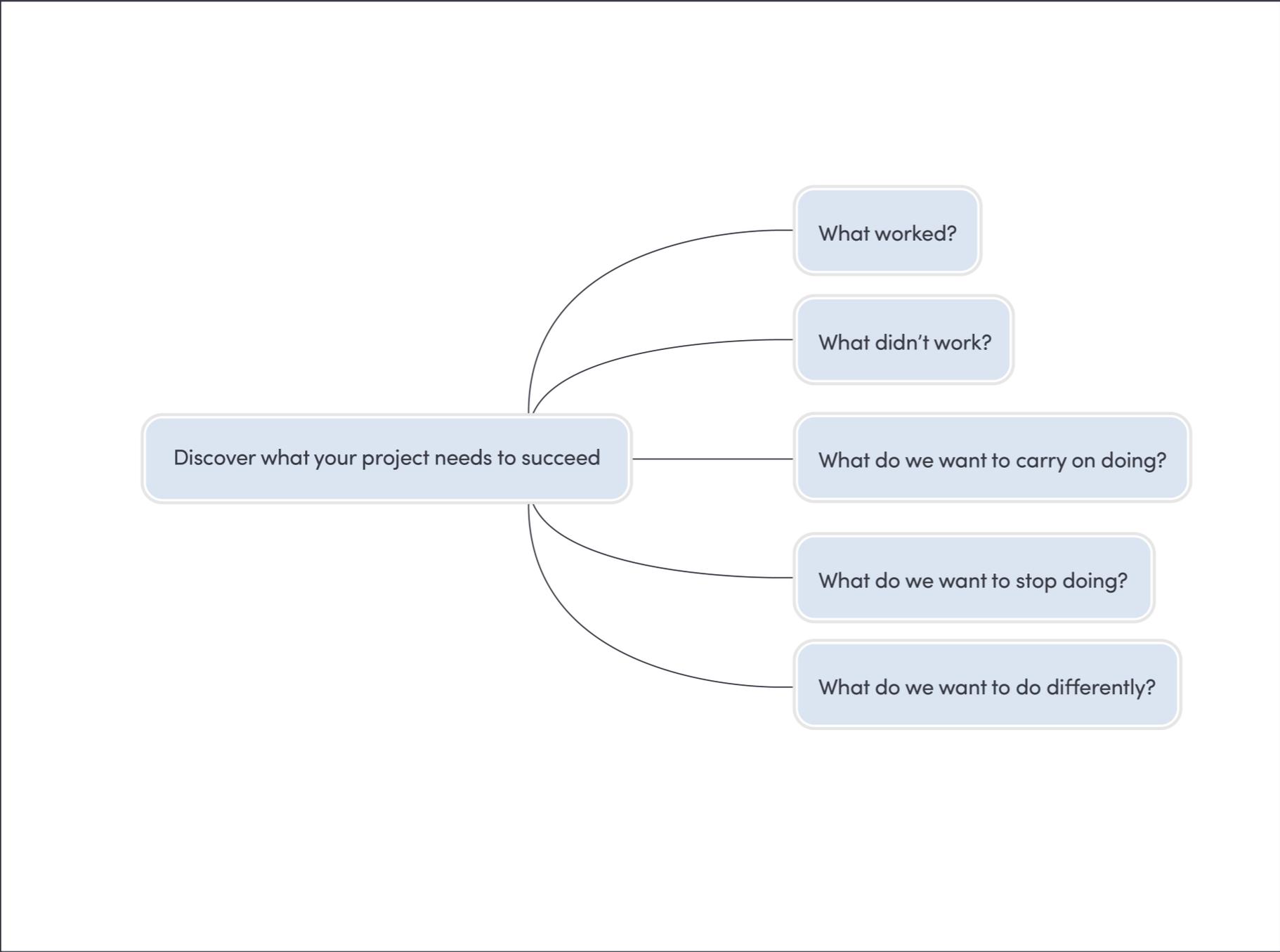
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# STEP SIX: NOW DO IT (FREE TEMPLATES)



## Learn lessons (and more)

It's important to learn lessons from the experience of planning and running your project.

We have a template that will give you the structure to do that, and you can use it in MindGenius, which will help you to manage and record the retrospective meeting.

Download a free trial of the software, as well as all the templates that accompany this guide.

[Download the trial and templates](#)

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## Projects made easy

**MindGenius is a practical project management tool that helps individuals, teams and organisations plan, deliver and monitor projects more effectively.**

 [www.mindgenius.com](http://www.mindgenius.com)