

PREPARING YOUR ORGANIZATION FOR SUCCESSFUL PROJECTS

What things must be done—in your organization—to not only manage a project, but to get it up and running successfully?

Chances are, many things are already predetermined about the way you work. Those processes and policies may have been explained to you in training or onboarding or could have come about or even changed over time. One thing's for sure: Keeping up with process documentation can be tough for any team or organization. That's a shame because those same processes and policies help you to set serious expectations about how projects operate, as well as how individuals should work and interact with teams and the organization.

THE
Art & Science
OF LEADING PROJECTS

 teamgantt

So what happens when you don't have norms in place? Well, you typically make big assumptions that everyone just inherently knows and follows some kind of norms. But making assumptions about who knows what this early in a project can be dangerous—and it can lead to missed expectations. That's why it's important to have some form of documentation about how you'll be running a project.

Use this guide to help you set and document norms for your organization.

“LET'S TALK ABOUT HOW WE WORK”

Before you jump into the lists below, you should know that defining your organization's norms should not be done in a vacuum. The minute a manager starts setting what could be perceived as “rules,” that person loses trust. Instead, start a conversation with your team and management, and work together to outline how you do things.

This can be a daunting task, so work in sections. We've broken topics out with a brief description and some possible discussion questions to help you along the way.



Process

The way we operate on projects is largely defined by a set project process. But, the reality is, process can change from project to project, so you'll want to stay pretty flexible. Maybe don't think of it as Agile vs. Waterfall as much as documenting repeatable steps that support your process. Here are some questions to ask:

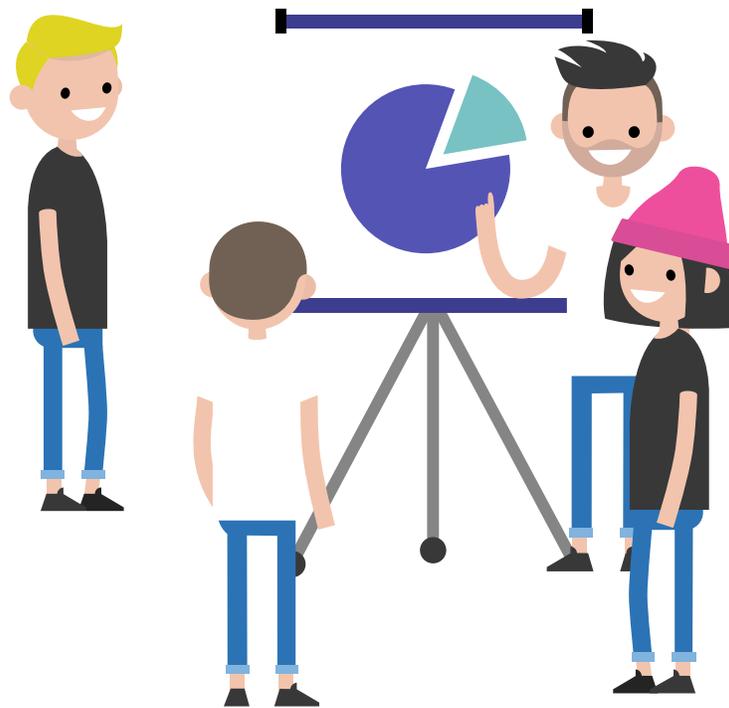
- How do projects get initiated?
 - Do we have a project brief or scope template that should be reviewed or completed before a project kicks off?
 - How do we onboard teams to projects? Who's responsible for that?
 - How do teams get introduced to stakeholders?
- What are the standard phases for our projects? (If there are several, map them out.)
 - What deliverables do we typically produce?
 - What is our internal review process?
 - What is our stakeholder review process?
 - What challenges do we have within the phases? What can we fix or at least be aware of as a risk we take on each project?
- Do we lean on any formalized methodologies?
 - If yes, what are they, and where are they documented? (Who was responsible for doing that, and how long ago? Do they need to be updated?)
 - If yes, are our teams trained?
 - If no, why? Should we? Or should we document the process we use? (The answer is yes.)
- What's expected of the project experience—not only from your organization and leadership, but also your team?
- How do we wrap up or close projects with teams and stakeholders?



Management

Process and the management of that process are closely related, but don't let them overlap too much in discussion. You'll want to think through specific role-related questions here. Here are some questions to help you sort out roles and responsibilities as they relate to management of projects and teams:

- Who manages the process on the project level?
 - Does this person have an updated job description that outlines expectations of them? (If the answer is no, get on it!)
 - What level of management responsibility does this person have over the team?
- Who manages this person, and what responsibility do they have to the project and the team?
 - What steps must this person take to ensure the project is on the right path?
 - Are there any documents or reports this person creates that should be considered part of the management process? (Examples might be project plans, status reports, etc.)
 - How are stakeholders involved in these steps?
 - Where can this person go when issues arise?
- How involved are management and executives on projects?
 - Do we have a way of establishing their roles and expectations at the outset of a project?
- What do we do when they cause hold-ups? Can we document a policy to help combat (or overcome) this behavior?



Staffing / Resourcing

You may cover these questions when talking about how to kick off projects, and that makes tons of sense. But this section goes deeper than staffing teams. Check out the questions below to make smart decisions that help you keep your team busy, but not overbooked.

- What types of services can your team provide?
 - What roles/titles do we staff?
 - How does each role contribute to projects?
 - Does each role have a clear job description?
- How do we select who will work on a project?
- How do we help people manage their time and juggle multiple tasks or projects? (Are there any systems or support people to go to?)
- How do we track the assignments and related effort on each team member's plate in terms of project and administrative work? (Do we use any resourcing tools or systems?)
 - Who's responsible for tracking that work?
 - How is that tracking done?
 - How is that tracking communicated to the team?
 - Do we check in on that data to see if it's realistic?
 - Who makes the decision to change workloads when change occurs?
 - How does our team deal with that change? Is it a good or bad experience for them?
 - If it's a bad decision, how can we make it better?

Budgets & timelines

Part of managing projects is keeping a keen eye on your budget and timeline. Some people are really good at this, while others make it a lower priority.

At the end of the day, can a project be successful if it's over budget and missed the original deadline? Well, that's up to you and your organization to decide. But we recommend setting firm expectations around how you track and manage these things. Here are some questions to help you arrive at norms that will keep you under budget and on time:

- Do our projects typically come in under budget?
 - Why? (Explore the many reasons why projects meet, beat, or exceed budgets, and set some norms for managing future work.)
- How do we establish budgets? (What is your estimation process?)
 - Who is a part of that process? And why?
 - Is anyone missing from the process?
- Are we confident about our estimates? (It's okay if you aren't, but if the answer is no here, see [Class 03](#) to sharpen your estimating skills!)
- How do we track budgets?
 - Who's responsible for this?
 - Does that person send updates about the budget? To whom?
 - What happens if we see a trend in the budget going over?
- How do we handle scope creep?
 - Do we have a change request template?
- How are project deadlines determined?
 - If they're stakeholder-imposed, do we ever push back?
- Do we create project plans?
 - Who creates them, and what's the process for creating and vetting them?
 - Do we have a standard format for plans? (You should!)
- How often are plans updated?
- How are plans shared with the team and stakeholders?
- What happens when someone misses a deadline?
 - How often does this happen, and why?



Collaboration

The modern workplace demands collaboration, especially when you work with cross-functional teams building products for customers. At this point, you can't work in a vacuum. If you do, you're likely missing out on great ideas, relationships, and even great project experiences. No matter where you work—whether you're 100% remote or located in one office—collaboration will make a difference for your teams and the projects you produce.

Of course, collaboration takes work, and some folks need real direction on how to collaborate effectively. So use these questions to document what will work for you:

- What's our organization's stance on collaboration? How important is it to our work?
- What expectations are placed on our teams when it comes to collaboration?
 - When is collaboration important to our projects? (Think about meeting/session types, deliverables that require collaboration, etc.)
 - What's the outcome of that collaboration?
- Do we have any set methods for collaboration?
- Do we have designated spaces (physically and virtually) for our teams to collaborate?
 - What are those places? (List them all.)
 - Does everyone have access to these spaces? (Don't forget about online accounts.)
 - Do we have enough places for all teams to collaborate when needed?
 - How do you work together? Are there any processes or guidelines to consider?
- How and when do managers get involved in team collaboration?
- How do we collaborate with stakeholders?
- What's been working well, and what needs some work in terms of how we collaborate?

Communication

Solid communication is critical to project success, as well as to our success as individuals. The thing is, we all have very different methods and expectations for communication. So setting norms is actually pretty critical.

What's important to remember here is, you never want to hamper someone's communications. Rather, make sure they're landing in the right place and that others are accountable for responding when needed. It's all about setting expectations about the modes of communication you use. Use these questions to help you sort that out for your organization:

- Who's responsible for the regular flow of communication on projects?
- What modes of communication do we use on projects? (Think about every aspect here. Everything from meetings to tools are on the table.)
 - Have we clearly outlined how we expect these tools to be used? (For instance, what should go in an email versus a direct message?)
 - Do we have problems with usage or adoption on any of these modes? (Example: Some people don't want to use Slack because it interrupts them. if that's the case, what do we do?)
- How are we doing with meetings? Too many? Not enough? What are teams saying about them?
 - What organizational meetings are required of employees?
 - What project meetings are required of teams?
- How are the following things communicated to employees?
 - Important organization-wide announcements
 - Changes in staffing (departures and new hires)
 - New work or projects won
 - New opportunities within the company
 - Social events
- How are the following communicated to teams?
 - New assignments
 - Tasks coming due
 - Changes to projects or tasks
 - Project issues/blockers
 - Stakeholder comments (positive and negative)
 - Project status
- Do we lack any communications as a team or organization?



Tools

Ahh . . . tools. Chances are, your organization uses a variety of tools to help you get through projects, whether they're related to management, design, metrics, technology, the list could go on for a while. The point here is that you need to make sure of 3 things:

1. Tools are accessible to all employees who need access.
2. The tools serve their purpose.
3. You've set the expectation for how tools should be used.

Ask yourself these questions to make sure you're getting the most out of those tools by setting the right expectations about them:

- What tools do we currently use across projects? (List 'em all!)
 - Who needs access to each tool, and why?
 - Is each tool serving its purpose?
 - Are there any redundant tools? Can you sunset them?
- More specifically, what tools need to be set up or used on a project-by-project basis? (Think of tools like TemaGantt that serve projects one-by-one.)
 - What's the purpose of each tool? Does the tool meet that purpose?
 - Who administers these tools? (Who has admin access and can add/remove users, etc.?)
 - Does anyone else need admin access?
 - Do you have standards for how these tools are used? (Think about naming conventions, feature usage, hacks you've created, etc.)
 - Have employees been trained on how to use the tools? And do you have an onboarding process for the tools for new employees?