

5 Best Practices for Effective Project Management - Part 1

By Brad Egeland

While leading our projects, we like to make sure we are doing so to the best of our abilities, helping our project team gain responsibility and experience, and keeping our project customer engaged. Sticking to overall project management best practices is what we strive for – or at least should be striving for – on every project.



So as you go through your project engagements, let's consider a few "best practices" litmus tests to perform (if only in your head) to make sure that you are delivering. If you don't do this, in my opinion, it can become too easy to fall into a rut of going through the motions and "just running the project." And by that, I mean doing what you're "supposed to do" but not necessarily doing what the project or customer needs or providing that extra WOW factor that customers like to see...it's what they keep coming back for, right?

There are many things you can do that meet these criteria, and what those things are and how you do them depends on the customer, the project, the industry, etc. However, there are a few best practices that you can consistently inject into your projects to make a difference. Here's my first two:

Formally Kick Off the Project

Make the project kickoff a formal occasion, and make sure all the important people are there. I don't care if it's a \$50,000 project or a \$50 million project. Do this. The \$50k project may kick off over the phone if the budget doesn't allow for a face-to-face gathering, but do it anyway. You aren't limited by technology in this area, so make it nice, and make it formal. It will set a certain expectation for the project, and your customer will appreciate the dog and pony show -- trust me.

Document the Project Well

This is broad, I know. But be thorough and purposeful with your documentation. Create some formal plans that mean something – communication plans on how project discussions will happen, requirements documents putting the project scope in perspective for each stakeholder, and

design documents that help developers move forward with coding and testing the solution they are working on. Also, have the customer sign off on these: make them official. Don't go overboard on the \$50k project, and – likewise – don't just phone it in on the \$50 million project. Let the formality and effort match the budget and visibility/importance of the project. That said, documentation is important, so do it right. Peer review all documentation before giving it to the customer. The worst thing you can do for customer confidence is hand over error-filled documentation and plans. Ouch. I've been there, and it is a very hard hole to dig yourself out of.

This article has started my discussion by covering the first two of my list of five key areas to focus on to ensure you are delivering quality, value and performance on the projects you manage for organisations and for clients. In Part 2, I will continue this discussion by examining three more areas.

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5 Best Practices for Effective Project Management - Part 2

By Brad Egeland

In Part 1 of this two-part series, I began my list of five areas to touch on to ensure you are delivering value to your project customers. We can all go through the motions, so to speak. But to go that extra mile, embrace best practices, add value and keep your customers coming back for more, you will need to be creative and dedicated. We have looked at the first two areas on my personal list of five best practices to use every project; let's look at the next three in this 2nd segment:



Conduct Regular Status Calls With the Client

I have to admit that while I do this for every project, I don't do this for every consulting engagement. I probably should. I let the size of the engagement and the customer's wants and needs dictate how that goes – and with frequent contact via email, Skype and irregular phone calls, everything is usually well-covered on consulting gigs. But with projects, it's a different story. Keeping your customer happy and feeling in-the-loop is important to the success of your project. Ensuring that your team is on track and isn't missing anything is equally important. Always conduct regular weekly calls with your team and your customer. Always.

Help Your Customer With Testing - to an Extent

I've said this before, and I'll repeat it here: don't do the testing for them...and don't help them too much. Basically, help them be well-prepared for it. Help them with test planning and test cases, and be there to help when they run into issues (and they will). This testing is the last opportunity for your customer to make sure that the project deliverables meet expectations. When finished, the team should expect formal customer approval.

Put Together a Solid Closeout Checklist

Finally, do a very thorough job with the project closeout. Don't just wing it when making sure everything is in proper order for deployment or rollout or implementation -- or whatever your proper terminology happens to be for

handing off the final solution. Make sure all deliverables are done and signed off, all tasks are complete, all training is in place, all testing has been done, etc. A good checklist that is put together early on and revised as needed will do the trick.

Summary

The bottom line here is add value and show value. You are running important projects and need to show that they matter. You need to put the proper effort into making sure that things are done right. And you can do that by exerting more than the absolute minimum effort needed on the project. Look for ways to make your customer happy, to get your team fully involved and take ownership of tasks and deliverables, and to ensure that what you are supposed to deliver is what you are actually delivering. And by following these and other best practices, in the long run, you will actually make your job as project manager easier, not harder. Work smarter, not harder -- that's what my wife always tells me, and I try to listen to her most of the time. It's a healthy situation.

I welcome your input to the discussion. In what ways do you add value, and what things do you consider to be key areas to focus on when delivering on your customers' projects?

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