THE ULTIMATE GUIDE TO

Project Management

By The Zapier Team

zapier

The Ultimate Guide to Project Management

Learn everything you need to successfully manage projects and get them done

Zapier

It started as an idea, that next amazing thing your team is going to do. Perhaps you'll build the next big thing, add a feature your users have been waiting for, or write that book you've been thinking about for years. Perhaps you'll put a man on Mars, or land a rocket on a boat, or reinvent the car.

Perhaps. But first, you'll need a plan.

Plans map your path, list what it takes to get there, and what needs done first. They're the essential ingredient to making sure your rocket has enough fuel, that you have a team ready to launch it, and that you actually build the rocket in the first place. They're what make project management work.

There's no set way to make a plan, nothing you must do to get from zero to hero. But there are a handful of popular project management strategies, dozens of project management apps, and an entire ecosystem of tools to gather feedback and set deadlines and track time and manage those projects. You're ready to launch that rocket, but first, it's back to the basics.

It's time for Project Management 101.

In this book, you'll learn everything you need to know about project management. You'll find detailed overviews of the most popular project management strategies, advice from teams around the world on how they manage projects, and roundups of the best tools to help your projects flow smoothly. It's everything you need to plan that rocket launch—and make sure it lands in the right place.

Who Is This Guide For?

Projects come in all shapes and sizes. Your team's next big invention? That's a project. Remodeling your kitchen? Ditto.

This book starts out with the basics of project management—it gets you up to speed on what lean, gantt, scrum and other project management terms are all about. It's perfect for the first time project manager, or anyone who feels overwhelmed by projects.

Then, there's app roundups of the best project management tools, along with the app stacks teams use to handle everything else in their projects. Those come alongside expert advice on running projects, choosing software, and using project management apps for personal tasks. They're perfect for anyone managing projects— whether you're looking for better tools and tricks to keep projects on schedule, or are just starting out.

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Intro

Thanks for downloading *The Ultimate Guide to Project Management*!

If you'd like to read this book on your favorite devices, you can download a copy from the Kindle Store to read on a Kindle, iOS or Android mobile device, or on your computer using the Kindle web reader.

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Enjoy!

~The Zapier Team

Chapter 1: An Intro to Project Management

It's a boring topic, project management, one filled with more cryptic vocabulary and acronyms than most. Wouldn't it be better to just *do* the work, instead of spending time coming up with new ways to micro-manage it?

Yet project management is essential, the stuff of champions. And it's something you already do, even if you're more likely to just jump in and do the work instead of writing down a plan first.

Perhaps simple tasks can just get *done*. But even for a blog post like this to be published, a process must be followed. One must at minimum write the text, add it to the blog CMS, and hit *Publish*. That post is suddenly a small project, with its own project management system.

Projects, you see, are just "proposed or planned undertakings." Project management systems, then, are ways to plan that undertaking. Do we start everything at once, or split tasks over time? What needs done before the next task can be started? Those questions and more are answered by your project management system.

Project management apps? They're just digital personification of those project management systems, a way to plan due dates and structure projects in some system. They're not all that different paper wall calendars you'd plot projects on in years gone by. The only difference is, as software, they can be "smart"—they can remind you of upcoming due dates, automatically reschedule future tasks when something's delayed, and make sure everyone on your team can see that calendar, no matter where they are in the world.

So, you've got it. You have an idea you want to pursue—that's your project. You decide the order in which to do the tasks, and who's responsible for what—that's your project management system. And you list all those tasks and due dates in a program—that's your project management app.

But it's not quite that simple. You'll likely need a bit more structure to your project, ways to manage your task workflows *and* deadlines, and make sure everything's done consistently well. That's where the most popular project management systems come in. They're built on decades of research from corporations and governments, and have been proven to work. And if they're not perfect for you, you could always tweak them into your own customized project management system.

A System for Managing Projects

That's what you'll learn first in this book: the best traditional project management systems, and how they work. Then, in chapter 3, you'll learn the essential skills of a project manager, tips that'll help you turn those project management systems into something that'll work for your team.

Apps for Managing Projects

Then it's time for apps to help put that project plan into action. Chapter 4 takes you on a tour of the Toyota factory-inspired Kanban boards, teaching you how to use them to make your own project workflow and giving you the best apps to create kanban board. If Kanban's not enough, the next chapter dives into the 50 best project management apps and their best features. There's even a free downloadable cheat sheet to compare the apps and find the best one for you.

Choosing the perfect app for your team from fifty great options is a bit overwhelming. That's why chapter 6 guides you through choosing project management software, and chapter 7 shows you the toolkits real companies use to manage their projects. With advice from real-world project managers—and tips on what's worked and what hasn't—you'll feel more confident in choosing tools for your team, or making your existing software work better for your needs.

Extras to Handle Everything Else

Your projects should now be squared away in a project management app now, happily humming their way to completion. But everything isn't done yet. You still need a way to make sure your tasks are completed consistently, that they're always done well, and that your quality never suffers no matter how much is going on.

That's what Chapter 8 is for. It teaches you the basics of standard operating procedures: how they work, why checklists and detailed instructions are so important, and how to use them in your work. You'll end up with yet another asset to help make your projects a success.

And in chapter 9, you'll get a bonus lesson on how to manage your personal tasks in a project management app. After all, you'll be

more successful at work if you're not stressed out about the things that need finished at home. Using the same tools to manage all of your tasks—and giving a workflow to your personal tasks—may be the perfect way to do that.

It's a lot to take in, but altogether you should learn everything you need to get your projects out of your brain and into an organized workflow that's actually accomplishable.

It's time to get that rocket you've been dreaming of to the moon, and back again. So let's get to work.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/project-management-intro/.

Written by Zapier Marketer [Matthew Guay](#).

Chapter 2: Project Management 101: The Complete Guide to Agile, Kanban, Scrum and Beyond
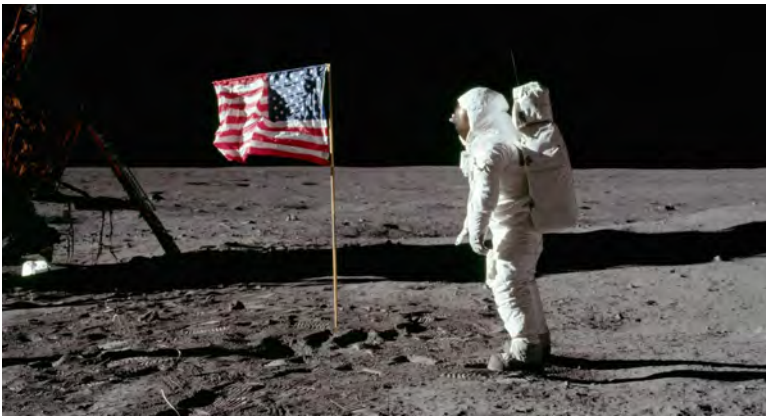
"Of all the difficulties facing NASA in its bid to send humans to the Moon in the Apollo program, management was perhaps the greatest challenge." - Roger D. Launius, chief historian, NASA

Humanity has a track record of wielding some serious project management chops. From building the Great Pyramids to landing on the moon, humanity's greatest endeavors have required thousands of people working together on common goals. That requires intricate project management to pull off.

Although most of us will never be tasked with goals of such scope, many of us have to manage projects in one way or another. The

Project Management Institute estimates there will be more than 15 million new project manager positions added to the global job market by 2020—and many of the rest of us will still have smaller projects to manage on our own.

Project Management, simplified, is the organization and strategic execution of everything that needs to get done to tackle a finite goal—on time and within budget. Whether developing new software, carrying out a marketing campaign, or landing a human on Mars, project management is what gets you to your goal.

Every project is different. There's no one-size-fits-all project management system—and there may be no one perfect system for you. But the past decades of experience have lent us a number of effective project management methods that can guide your work.

Popular Project Management Systems

- Traditional Project Management
- Agile
- Scrum
- Lean
- Kanban
- Six Sigma
- PRINCE2

Before diving into any one method, let's answer the obvious question—*Why do you need a project management system at all?*—provide a brief history of project management, and define common project management terms.

Why Project Management?

Dr. George E. Mueller presenting the Apollo program to President John F. Kennedy on November 15, 1963

Neil Armstrong and Buzz Aldrin's names will forever symbolize one of humanity's greatest achievements: putting a human on the moon. Yet, with over 400,000 NASA employees and 20,000 companies and universities working together on the Apollo missions, the people who managed the project may have been the most crucial to actually landing on the moon.

In 1961, President Kennedy committed to putting a man on the moon—and bring him back safely—within a decade, when NASA had only ever sent an astronaut to space for 15 minutes. Such a staggeringly complex project necessitated an incredible amount of resources, teamwork, innovation, and planning. Do each part at random, and it'd never get finished.

As recounted in NASA's "Managing the Moon Program," the problem wasn't so much *what* to do, as much as it was *how* to do so much in so little time. "We knew what had to be done," recounted Dr. Max Faget, head of engineering at Johnson Space Center. "How to do it in 10 years was never addressed before the announcement was made. But quite simply, we considered a program of a number

of phases."

What mattered, then, was accelerating each phase and making sure the various teams and companies working on each part of the project could collaborate effectively, delivering finished work in a timely manner. That task fell to Dr. George E. Muller, who managed every part of the Apollo project from the White House to the smallest supplier. To ensure all phases worked perfectly, he broke each down into five areas: Program Control, System Engineering, Testing, Reliability & Quality, and Flight Operations.
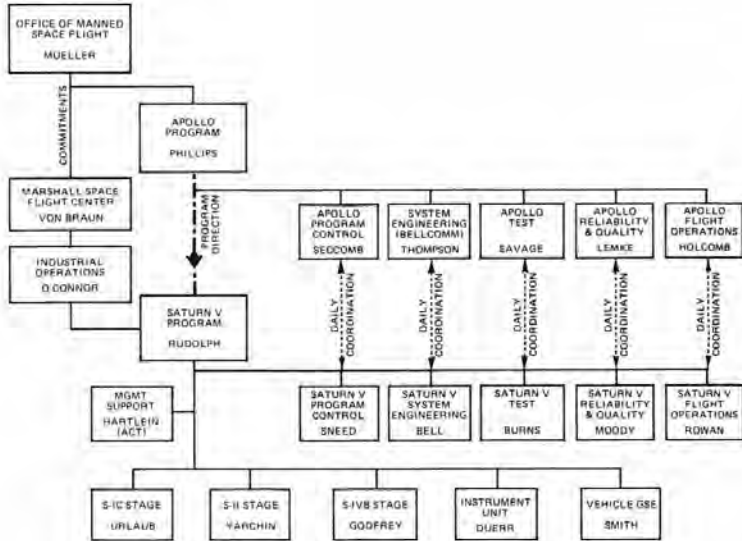
This five box system—called GEM boxes after Muller's initials—was designed "to focus, early on in the program, on the fact that you were going to test things, and you ought to design so you can test them," said Muller. Program Control described what was needed, managed the budget and requirements, and specified how each piece worked together. System Engineering designed new items, Testing made sure it worked, Reliability & Quality made sure each item was up-to-spec, and Flight Operations ensured it'd work in flight.

"When people were first confronted with your approach to things, like all-up testing and management of the systems level, there was an initial skepticism that that was the right way to do business," recalled Dr. John Logsdon of the feelings when Muller's project management plan was introduced. But it proved itself out.

As Dr. Muller said, "the amount of time it took to convince people that that was, in fact, a good thing to do, and, in my view at least, was necessary in order to provide the kinds of communications that were required in that complex a program in order to be sure that all those interfaces worked."

Muller's project management system was a resounding success. NASA put the first humans on the moon and brought them back to earth safely in less than a decade of Kennedy's announcement. That was only possible by breaking down the enormous project into manageable, repeatable steps, ones that guaranteed success even when working with so many individuals and companies. It was a project management system—and teamwork—that won the space race.

A Quick History of Project Management

Project Management wasn't new to NASA and Dr. Muller; Egypt's pyramids and the Great Wall of China showcase the results of project management from bygone millennia. There's little documentation of early project management methods, and today's project management methods are descended from ideas from the past century.

The most obvious way to break a project down is by its phases or tasks. Take cooking a recipe, for instance: you purchase the ingredients, combine them correctly, cook them, and then serve

your finished meal. A simple project management method would be to list each step and check it off as it's completed—a simple to-do list, perhaps, would suffice.

Maybe you'd want to cook multiple dishes—perhaps you'll make a salad (with just three steps since it doesn't need to be cooked) and a dessert (with just one step since it's pre-made). You'll need to serve each dish on time, and still make sure everything gets done. Suddenly, you'll need a more powerful project management system, one that lines up the time needed for each task with the time each task is supposed to be completed.

That's where one of the first modern project management tools— the Gantt chart—comes into play.
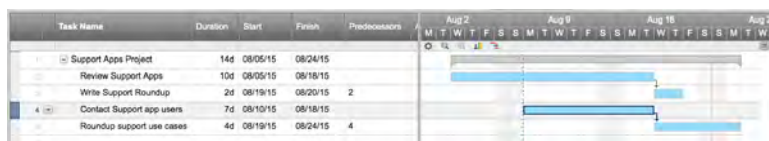
A list of tasks along with a Gantt Chart calendar, made with Smartsheet

Invented independently by Korol Adamiecki and Henry Gantt in the early 20th century, the Gantt chart lists a project schedule based on start and finish dates. You list how long a task takes, and if any other tasks have to be completed before that task can start—for instance, you can't serve your meal before you've cooked it. You can then calculate the "critical path" of the activities that must be completed by certain dates, and estimate how long the total project will take.

Traditional project management looks a lot like this dinner project, only with far more tasks and more stringent deadlines and carefully planned resources. A project with tight deadlines might use a Gantt chart to decide when to start tasks; a project where resources are more constrained (say, a dinner project where two different dishes need the oven at different temperatures) might use an event chain diagram—much the same as a Gantt chart, but focused on the usage

of resources other than time.

Some projects need more or less structure than traditional project management gives you. If you're publishing a series of articles on a blog, specific deadlines might not be as helpful as a process where you plan each article, write the first draft, get early edits and feedback, finish the article, proofread it, and then publish it. Instead of managing time or resources, you'll manage process, running every task through the same checklist or workflow.

It's for projects like these that Agile project management and its many offshoots—Lean, Kanban, and more—have been developed, to help you make a process to produce consistent work. Some projects need to add more dates and resource allocation back into an agile workflow, so more advanced techniques like Six Sigma and Scrum have been developed as well.

Popular Project Management Systems

A century's march of industrial and technological revolution have left behind enough examples of projects to have a project management system for almost every possible need. Even if your projects have less lofty goals and involve far fewer resources than sending a man to the moon, a structured project management system can help ensure your project's success. You'll just need to figure out what's most important in your project—due dates, resources, process, or a mix of the three—and then pick a project management system that can help you effectively manage and finish your project.

Before you dive in, though, let's cover a list of the most common— and likely unfamiliar—terms you'll find in project management.

Common Project Management Terms

- **Agile**: An iterative form of project management where tasks are completed through specific phases
- **Critical Path**: The list of the critical tasks that must be completed before a project is finished; together, they show the total estimated project time
- **Event Chain Diagram**: A bar graph of events in a project and the order they'll be completed based on resource availability
- **Float**: The amount of time a task can be delayed without causing a delay to subsequent tasks or the entire project
- **Gantt Chart**: A bar graph and calendar fusion that shows the time each task in a project will require; a form of an event chain diagram that's focused on time.
- **Milestone**: The time when important tasks in a project are completed
- **Project Manager (PM)**: The team member whose top responsibility is to plan, carry out and close a project.
- **Resources**: Elements required to complete a project, including time, equipment, supplies, team members, and other resources
- **Scope**: The definition of what the project will cover; when this grows during the project it's called "scope creep"
- **Sprint**: Also called iteration; a period of time in which a certain part of a project is created and shipped
- **Traditional Project Management (TPM)**: Basic project management where tasks are completed one after another

With that knowledge tucked away, it's time to find a project management system that can fit your team. We'll first look at Traditional and Agile project management—the two main ideas that most other systems are based on—then dive into Scrum, Kanban, Six Sigma and more.

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Traditional Project Management

Perhaps the most obvious way to break up your projects into a workflow, traditional project management is often referred to as "waterfall" project management because it handles one thing after another in a linear order. Think of it like your favorite mobile game, such as Candy Crush: you can't unlock the next level until you've beat the one you're in (and hopefully, your project is just as fun if not frustratingly addictive).

Traditional Project Management, or TPM as it's abbreviated, stresses on-time delivery within a stringent budget. It's best for projects where tasks need to be completed one after another—or where you want to emphasize planning and design before you start building the actual project.
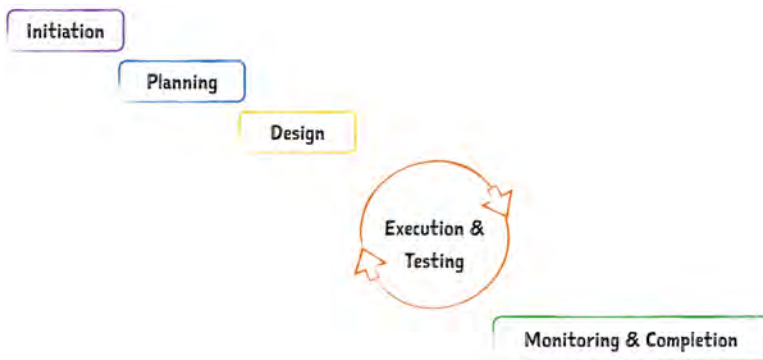
You could make your own "traditional" project management system by breaking any project down into steps that must be completed one after another, but standard TPM has six specific stages: initiation, planning and design, execution, testing, monitoring and completion.

- **Initiation phase:** The project manager and team determine the product requirements. Otherwise known as as "requirements determination", it's a fancy way of saying everyone

participates in a brain dump, listing everything that needs to happen to get to the finish line.

- **Planning and design phase**: This step can be broken into two categories: basic design and detailed design. During this phase, the team makes sure the proposed design meets the product requirements. For software design teams, for example, this is the point where they choose their coding language and decide how they want to structure the user experience.
- **Execution** (or Implementation) and **Testing phase**: These are the steps where the ball really gets rolling—construction and integration all happen in this chapter. Following the detailed design, the team builds the product, measuring its development against specific metrics established in previous phases. Each part of the execution has its own steps, which move the project to the next half-phase: testing. Just as important as the design phase, testing is where you discover and fix any glitches, whether it's bugs in the software or poorly placed wiring in a construction project. After testing, anything that still needs work gets shifted back to the execution phase— round and round you'll go, until the project is finished.
- **Monitoring and completion** (or Management and Mainte- nance) **phase**: This phase is the long tail of your project, the work that never quite ends. You're dedicated to keeping customers and users happy with your product by discovering ways to improve it, while simultaneously maintaining and providing support for the product.

Dig deeper into traditional project management styles, and you'll find a few variations on these phases. Not all projects need every stage of the traditional waterfall model—some may need only three, while others need an "iterative waterfall" where work is divided into sprints rather than blocks of start-to-finish subprojects. Either way, the idea is the same: your project is broken into phases, and one must be completed before the other.

Since TPM is such a time-driven approach, common scheduling tools work great for traditional project management. You can list phases in a to-do list app, or block out time on a calendar. The best TPM tool, though, is the trusty Gantt chart which helps visualize each phase of your project and the time it'll take. You could make one in a spreadsheet like Smartsheet, or use traditional project management tools like Microsoft Project to build them.

Traditional Project Management Strengths

True traditional project management is perhaps an old school model, but its strengths have allowed it to keep hold. It requires upper management to *clearly define* what it is they want, giving the project focus and consistency early on. The emphasis on customer review and testing is meant to catch (and attack) problems early, causing a small headache now so that teams can avoid a horrid migraine later. It ensures the project will be well planned and tested thoroughly before delivery—something crucial for many real-world projects.

TPM can potentially cut down on stress and missed deadlines because each phase allows enough time for full completion and worst-case scenarios, meaning a disaster-free project can be delivered before deadline. With everything planned out, you'll know the exact resources and time needed for the project—even if they may be over-estimated in rigidly-set estimates.

Traditional Project Management Weaknesses

TPM's rigidity is also its greatest downfall. It's like an old, dry tree: it's rigid, and doesn't do well with change. Toyota, where Lean and Kanban project management were pioneered in their manufacturing departments, is even criticized for using TPM in their software development since it makes them less flexible to changes.

It's perfect for places like the construction industry, where project scope and direction remains relatively unchanged throughout the project. But if time and resources aren't your main constraint, or you need more flexibility to change your project as it's under development, you might find that another project management method is better for you.

Agile

Every project isn't structured in a way that'd work well with the Traditional Project Management method. Think back to our meal example: while cooking one dish might work perfectly in a traditional, one step at a time model, serving a four-course meal would be *impossible* if you were waiting for each part of the meal to be fully finished before starting on another.

That's where Agile, or iterative, project management comes into play. Instead of breaking your project down into phases that each have to be done before the other, you split your project up into smaller projects and ship each one as steps towards reaching the full goal. You'll plan the broad ideas of the project and divide it up, then plan, design, build, and test each part of the project individually. That lets you ship faster, and makes it easier to adapt the project to new needs before shipping it again.
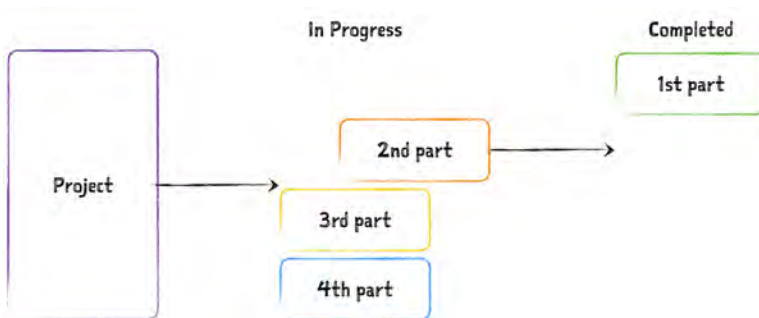
Agile isn't a new concept—iterative project management, at any rate, has been a common idea since at least 1957. In software development, however, Agile became popular with the release of the Agile Manifesto in 2001. That document emphasized collaboration and the ability to respond to change, two practices TPM makes difficult.

Agile on its own isn't a full project management method—it's more of an idea of how projects could be managed. Scrum, Lean, Kanban and other more structured project management methods came from the iterative or Agile ideas, improved on them, and gave teams a better foundation to start managing their own projects.

Agile Strengths

Agile's greatest strength is its flexibility—it can be almost anything you want it to be. That's why it's the framework behind so many other project management systems. You can take the Agile idea of breaking your project into completable chunks and doing each at a time, and then customize the overall process to fit your needs.

One of the main idea of Agile, as espoused in the Agile Manifesto, is "Responding to change over following a plan." The flexibility you get from a less rigid system that still puts an emphasis on shipping parts of your project can be enough to make Agile worth adopting. Or, if your projects are usually open-ended where you need to continually ship new parts—say, a blog with new posts every day—Agile is a perfect way to break down your work.

Agile Weaknesses

As so often happens, Agile's strength is its greatest weakness. A flexible system like Agile can make it difficult to focus and push your projects to completion if you're not careful. There's less set in stone, and no process to make sure the project is continuing

smoothly, making it easy for projects to lose direction.

You can add your own processes on top of Agile—or just make sure your team's always communicating and pushing the project forward—or you might end up finding that one of Agile's more focused derivatives are better.

Scrum

Arguably the most structured framework of the Agile methods, Scrum was first introduced in the 1986 as a way for "teams to work as a unit to reach a common goal," according to its inventors Hirotaka Takeuchi and Ikujiro Nonaka. Scrum takes parts of Traditional and Agile project management ideas, and combines them for a structured yet flexible way to manage projects.

Like Agile, Scrum breaks projects up into tasks that are completable on their own, and then assigns each a "sprint"—two to four-week slots of time dedicated to ship that phase of the project, with daily sprints to ship some part of that phase. It's that focus on time that makes Scrum a bit more like TPM, bringing more structure to the Agile idea.
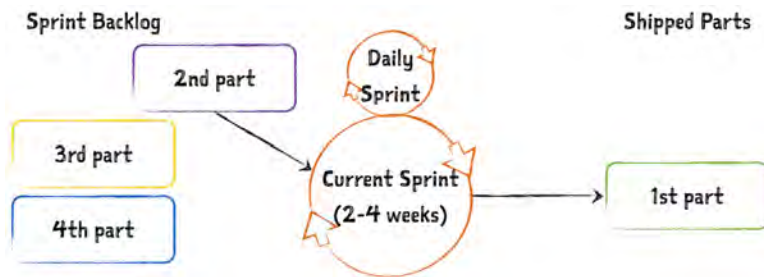
Then, to make sure the project is progressing as expected and meeting goals that may have changed along the way, Scrum requires a reassessment—and potential project changes—at the end of each sprint. It also divides responsibilities into three roles: the Product Owner (PO), the Scrum Master and the Team.

The Product Owner, who should be deeply familiar with all aspects of development, makes sure that everything aligns with business goals and customer needs with a mile-high view of the overall project. The Scrum Master is the team cheerleader—a liaison between the PO and the rest of the team—who makes sure the team is on track in each individual sprint. The Team then is the people working in each sprint, dividing the tasks and making sure everything is shipped.

With all this management and focus on deadlines, Scrum's main structure revolves around 5 meetings: Backlog Refinement, Sprint Planning, Daily Scrum, Sprint Review and Sprint Retrospective.

- **Backlog Refinement Meeting** (also called "Backlog Grooming"): This meeting is much like the planning phase of TPM, and is held on day one of each sprint—you'll look over the tasks left in the project, things left behind from previous sprints, and will decide what to focus on. The PO makes the call on how to prioritize tasks, and this ultimately determines how efficient the sprints are.
- **Sprint Planning Meeting**: Once the PO decides what to focus on, this meeting helps the team understand what they'll be building and why. You could share "user stories," describing features from the customer's point of view, or could simply divide tasks for each team to work on during the sprint.
- **Daily Scrum Meetings**: Simple daily meetings that should only last about 15 minutes, Scrum meetings are a way for team members to update each other on progress. This meeting is not the time or place to air issues—those will go to the Scrum master outside of the daily meetings—but instead is a place to keep the ball rolling.
- **Sprint Review**: Since a potentially shippable item is expected at the end of each sprint, the Scrum framework naturally places an emphasis on review. Team members will present

what they've completed to all stakeholders. While this meeting pushes accountability, its goal is to make sure that the sprint's completed items match up with business and user goals.

- **Sprint Retrospective**: Held immediately after the sprint review meeting, the Sprint retrospective is full of collaborative feedback. Looking at successes and hold ups, everyone decides what is working (what they should continue doing) and what isn't working (what they should stop doing). This should inspire the focus of the next sprint.

Where other project management systems might look like they simplify your projects and make them seem more manageable, Scrum can at first glance look overwhelming. You'll need to delegate responsibilities and plan extra meetings—but that overhead can help ensure your projects are successful and stay on track. It's a structured way to make sure everything gets done.

Scrum Strengths

Scrum is designed for projects that need parts of the project shipped quickly, while still making it easy to respond to change during the development process. With so many meetings and ways to delegate tasks, it's also great to use when parts of the team may not be as familiar with a product's context (i.e. developers from different industry backgrounds working on a system for the financial sector). You'll always have someone looking out for the project as a whole,

so if each person on the team doesn't understand the entire project, that's OK.

Netflix is a great example of Scrum's ability to help you ship fast. It updates its website every two weeks, and Scrum was a good match because it stresses the user experience, eliminates what doesn't work, and leaves a small window of time to get things done.

For each site iteration, the designers would test new features, forget the ones that didn't work out and move on to new functionalities. Most of the benefits the Netflix team saw with Scrum was the ability to "fail fast." As opposed to launching one massive redesign with many components, their bi-weekly incremental design changes were easy to track; if something went awry, they knew exactly what it was tied to—and could fix it, fast.

Scrum Weaknesses

Like Netflix, you may experience downfalls of Scrum, such as upset designers who saw their beloved work chucked after testing showed it didn't work—especially when the testing comes so quickly and some may feel that the new ideas would work with more time. You might also have trouble adjusting if your team is accustomed to long release cycles—or, depending on your work, you might find shipping so often isn't necessary.

Scrum's meetings and management overhead can also be overkill for some projects, turning into something where you're more focused on planning sprints than you are on actually getting work accomplished during them.

Lean

Agile project management dictates that you break your work up into smaller, shippable portions, but it doesn't say much about how to manage each of those portions of your project. Scrum tries to fix that with managers and meetings; Lean, on the other hand, adds workflow processes to Agile so you can ensure every part of your project is shipped with the same quality.

With Lean project management, you'll still break up your project into smaller pieces of work that can be completed individually. You'll also define a workflow for each task, something that's reminiscent of the Apollo project and its five box system. Perhaps you'll have a planning, design, production, testing, and shipping phase—or any other workflow of phases that you need for your task. Cooking a meal might need a preparation and cooking step, while a writing workflow might need an editing and fact-checking step.
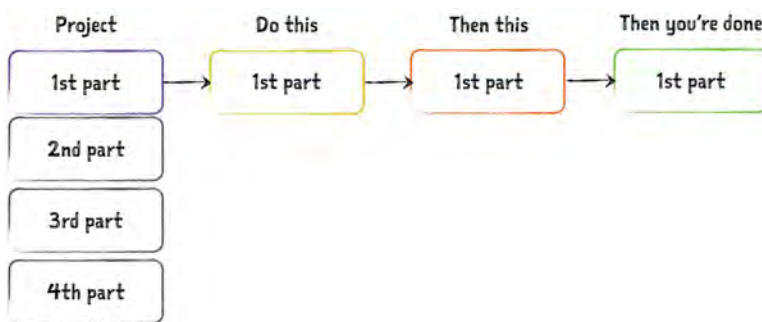
Lean's stages and their flexibility make it a great system for making sure each part of your project is done well. It doesn't have Scrum's strict deadlines, or force you to work on one thing at a time as TPM does—in fact, you could have various tasks in various phases of your Lean workflow at the same time. What it does do is let you build a system tailored to your team.

Just like Agile, Lean is more of a concept than a set-in-stone project

management system. You can use the Lean ideas, and build the system you need for your projects.

Lean Strengths

If you liked the idea of Agile, but wanted a way to make sure each part of your work is consistently finished with the same level of quality and oversight, Lean gives you the extra tools you need to make that happen. It's still flexible—you can define the stages of your project portions as you want—but there's enough structure to make your projects a bit more guided.

Lean Weaknesses

Every part of your project doesn't necessarily need the same level of oversight or the same steps for completion, but lean treats everything the same. That can be one major downfall in using it to manage projects with diverse parts that all need completed.

Lean also doesn't have any process to make sure the final project is completed, making it easy as it is with Lean to let your projects drag on forever. It's again something communication can clear up,

but it is worth keeping in mind.

Kanban

Lean sounds a bit abstract on its own, but combine it with Kanban and it's easy to build your own Lean project management system. Conceived by Toyota engineer Taiichi Ohno and implemented in 1953, Kanban is set up much like a factory floor, where a part might start out as a piece of metal and then, one step at a time, is turned into a finished part through a series of steps. In the same way when using Kanban, you'll do some work towards a project, then ship that item on down the line to the next station where something else is done.

Kanban also pulls inspiration from the grocery store model: for maximum efficiency, carry just enough on your shelves to meet customers demand. So, in Kanban, instead of plowing ahead on shipping a complete project, you can leave tasks at various stages until they're needed—whether that's half-made, low-demand parts in a factory, un-edited blog posts in your queue without a publish date, or anything else that's waiting for a need in your workflow.

It's a lot more laid back than Scrum—there's no set time for sprints, no assigned roles outside of the product owner, and a zen-like focus on only the task at hand. You could have meetings about your overall projects, or not: it's up to your team's needs.

Ideas	Partly Done	Almost Finished	Done
Something *and some notes about what we're doing and what's important about this task*	**A part** *This part has been made from metal and has the correct holes drilled in.*	**Needs tested** *This part has been fully made, but needs tested to ensure it's ready for work*	**New Part** *Everything's been done to this part—it's ready to begin its new life*
Another thing *Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc vitae augue tincidunt*			
3rd thing *Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc vitae augue tincidunt*			

All you have to do is define the stages of your workflow, then setup a way to move each task from one stage to the other. In a factory, you might have different boxes or shelves for each stage: raw materials in the first, half-made parts in the second, and completed parts in the third. For other projects, you might have a card—whether a note in a program, or a physical piece of paper on a board—where you list info about a task, and you'll move that card to different lists as the task progresses.

Your Kanban system can be as flexible as you want—it's really just a way to visualize the Agile idea—but there's four pillars of the Kanban philosophy that can help make sure your projects get shipped. These include:

- **Cards** (Kanban translates to "visual card"): Each task has a card that includes all relevant info about it; this makes sure everything to complete the tasks is always at hand.
- **Cap on work in progress**: Limit how many cards are in play at once; this prevents teams from over-committing.
- **Continuous Flow**: Move down the list of backlogs in order of importance, and make sure something's always being worked on.
- **Constant improvement** (otherwise known as "kaizen"): Analyze the flow to determine how efficiently you're working, and always strive to improve it.

Kanban Strengths

Like Scrum, Kanban fits best with a highly cohesive team that knows what it takes to keep the flow going—but unlike Scrum, it's designed for teams that are self-motivated and don't need as much management or deadlines. It's great for those who lean toward seeing the entire project at a glance.

While the two-week Scrum rule is absent and subprojects can take however long they've been given, you should still have an overall focus on efficiency—which should help save resources. If you're careful to follow Kanban rules and only assign as much work as a team can handle, projects are less likely to go past deadline and team members are less likely to juggle other distractions. And because the product owner can change tasks that aren't currently being worked on along the way, it allows for flexibility without frustration.

Kanban Weaknesses

If only one of your team members has a certain in-demand skill, the individual can hold up everything. Kanban is ideal for teams that have members with overlapping skills, so that everyone can pitch in

and help move the backlog list to zero. It's also best for places where time on the overall project isn't quite as crucial; if you *must* ship by certain deadlines, TPM or Scrum give you the time management structure you need.

Six Sigma

Motorola wasn't about to let the auto industry take all the credit for project management innovation, so decades after Toyota's introduction of Kanban, the mobile phone company's engineer Bill Smith created Six Sigma in 1986. It's a more structured version of Lean than Kanban, one that sets specific stages and adds in more planning to save resources, ship quality products, and eliminate bugs and problems along the way.

The ultimate end goal is to make customers happy with a quality product, which is done through continuous improvement heavily reliant on data analysis. You ship parts of your project along the way, while at the same time address product pitfalls that come up—something very similar to the Apollo project's workflow.
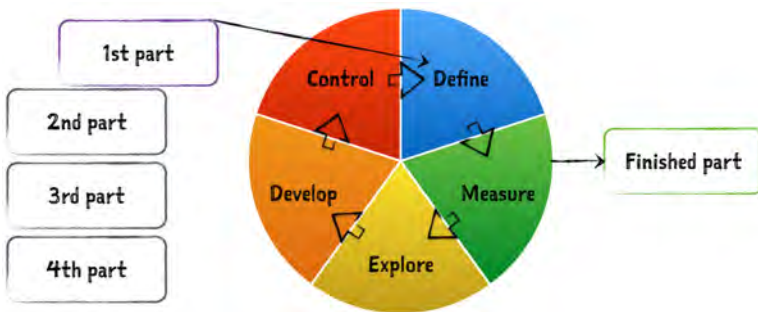
This is accomplished through Six Sigma's five steps, known as

"DMEDI": Define, Measure, Explore (or analyze), Develop (or improve) and Control.

- **Define**: This first step is much like the initial steps in other project management frameworks. Everyone determines the scope of the project, gets information from all sides, and determines what the business goals are (for example, sales).
- **Measure**: Because Six Sigma is big on data, the measurement stage establishes the nature in which the team will calculate progress—your overall goals. Seeing the rate of success—the value to the consumer as well as the business—as a quantifiable thing is at the core of Six Sigma.
- **Explore**: During the exploration stage, it's up to the project manager to figure out the ways in which the team can meet and exceed product requirements. This keeps you from going over budget and missing deadlines. If something didn't work last time, it's likely not going to work this time, so project managers (PMs) have to be adept at thinking outside of the box.
- **Develop**: It's only at this fourth step is a strategic plan is put in place. And it's a detailed one—anything that will or might be needed to get the job done finds a place somewhere in this plan. Most of the project's momentum occurs here, because you apply the plan, work on the next project map, and measure results as you go.
- **Control**: The last stage is about long-term improvement, which is what a Six Sigma project strives for. A documented review full of lessons learned is applied throughout the company, and to future projects, as well.

It's much like a Kanban approach, only this time with set stages for the project that make you plan, define goals, and test for quality at each stage. You'll likely end up with more meetings than Kanban calls for, but you'll also have a far more structured way to approach

each task. And just like Kanban, you can customize the phases for what your project needs—you'll just need to keep the measure and control steps in place if you want to learn from past projects and continually improve your processes.

Six Sigma Strengths

Six Sigma runs a tight ship, which can help you continually improve your processes and ship better results. By defining the goals and then reviewing them later, you'll have objective data to measure project success with—something that's far better than just going on intuition. While gathering and learning from data can take up a significant amount of time, you'll be able to learn from what you've done and improve your work in the future—and that's where time and quality savings should come in.

There are plenty of scenarios in which the job is never really done—that's where Six Sigma shines. It helps you ship your tasks, learn from them, and improve the next time around.

Six Sigma Weaknesses

Project manager seem to have similar gripes about Six Sigma: cost savings are the goal but not guaranteed since customer satisfaction will take precedence. If you're continually adjusting your goals with each task in the project, it's easy to let things spiral out of control even while you're trying to ship your best possible work.

Then, Six Sigma's underlying motto that good is never good enough can be frustrating for some, who may feel like the ghost of continuous improvement never brings them the satisfaction of finalizing a job well done. Some project may only be done once, and the focus on metrics and incremental improvements may seem unnecessary there.

PRINCE2

NASA wasn't the only government organization working to improve project management. The British government has honed their project management methods for years, cumulating with PRINCE2 in 1989. An acronym for *PRojects IN Controlled Environments version 2*, PRINCE2 throws sprints out the window, and instead approaches a project as one big sprint and stresses quality of delivery—like a traditional project management version of Six Sigma. The framework is more focused on the ends rather than the means; what's expected of the end product will determine the scope and shape the planning.

There are three interests at play with PRINCE2: the business interest (is it going to make money?), the user interest (will customers find this valuable?) and the the supplier interest (do we have what we need to make this happen?).
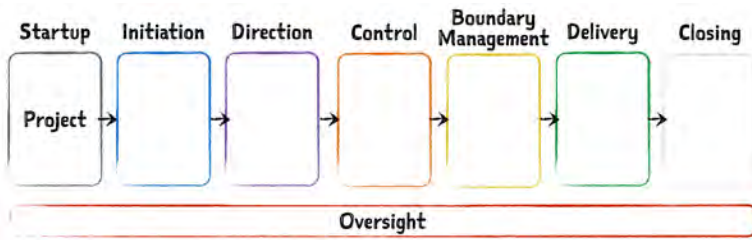
PRINCE2 has a more clearly defined personnel structure than most
project management systems, one that works for larger projects
that governments and other large organizations must undertake.
Each team member has specific roles, which carry through all 7 of
PRINCE2's stages: Startup, Direction, Initiation, Control, Boundary
Management, Planning, Delivery and Closing.

- **Startup**: First on the agenda: leadership chooses a project
  manager and clearly relays everything that they expect the
  product to be. The PM, whose main focus is the fine details,
  reports to the project board, which puts together the project's
  direction. The project board steers the course of the project
  and is ultimately accountable for its success. The remaining
  members make up the team.
- **Initiation**: During this step, the project manager writes the
  "initiation document," a plan to bring the project into reality.
  Once the project board signs off, it's time for the control
  stage, when the project is divided into phases. These phases
  don't have to last the same amount of time; the duration of
  each is determined by what each realistically demands. Like
  waterfall, a phase must be completed before moving on to the
  next one.
- **Direction**: It's not enough to have oversight—you also need
  to know exactly *how* a project should be overseen and
  managed. The direction phase sets the overall management
  structure for the project, outlines how each stage should
  progress, and what should happen if something changes

along the way.

- **Control**: Some amount of change is inevitable, which is why PRINCE2's per-stage review can be helpful. The roadmap for each phase is determined by the review of the previous one. So while there may have been a general plan, that can be manipulated if a review shows a need for something else. Once again, the project board has to sign off on this—bringing double the meaning to the "Boundary Management" stage.
- **Boundary Management**: The management stage looks at product delivery: what is going out (for example, what features will an app keep or chuck?), how it's going out, and asks, is the product that is going out exactly is what the business wanted, and meets all requirements?
- **Delivery**: From a project manager's perspective, this is where the most important oversight takes place. As work begins on product delivery, the project manager is in charge of making sure that everyone is doing a job that aligns with the project's goals and getting approvals once parts of the project are completed.
- **Closing**: After everything is said and done, the closing stage still remains. Closing is an in-depth analysis of how the project faired. This is put into a report, which also has to be approved by the project board.

That may be a bit much for some projects, so you can still customize the stages for your needs, while still keeping the same general idea of PRINCE2's structure, planning, and reporting back to upper management. Just like Scrum is a more structured version of Agile, PRINCE2 is a more structured TPM system, with some of the benefits of the Lean approach thrown in.

PRINCE2 Strengths

PRINCE2 works best when the stakes are high and there needs to be several pairs of authoritative eyes on the project every step of the way. If you're big on feedback and *guaranteeing* nothing will go wrong, this might work well for you.

That's why PRINCE2 is so popular in government offices—it's used in the United Kingdom's government, and is the standard for project management for the United Nations. It's been successfully used by VocaLink to streamline real-time money transfers between banks in Australia and the UK, something where there is zero tolerance for flaws and where communication is essential.

PRINCE2's Weaknesses

Despite PRINCE2's success in governments, it isn't without its drawbacks. If used in the wrong environment, there's lots of opportunity for bottlenecks and politics. Because of the extensive reviews and sign-offs, you might end up wrestling for control or find that work is delayed because someone hasn't signed off yet. And strictly defined roles can stave off a sense of true collaboration.

Project Management Systems in Play

Every project and team are unique, and so the project management systems that work best for each team are different. There are teams around the world that use each of these systems in wide ranges of industries—you'll surely find software developers using TPM, governments using Scrum, and grocery stores using Six Sigma if you look hard enough.

More often, you'll find teams using their own take on project management, using the best parts of different systems to fit their needs. Here are three stories where project management saved the day—stories that might help you figure out which system would work best in your team.

Kanban

Back in 2010, the Vienna-based startup Tupalo, a social network that lets users review restaurants and places of interest, was experiencing rapid growth. Dealing with a never-ending mountain of requests from both users and employees, the developers were faced with more tasks than they could process. Instead of prioritizing, they'd work on more than one thing at a time—all the time.
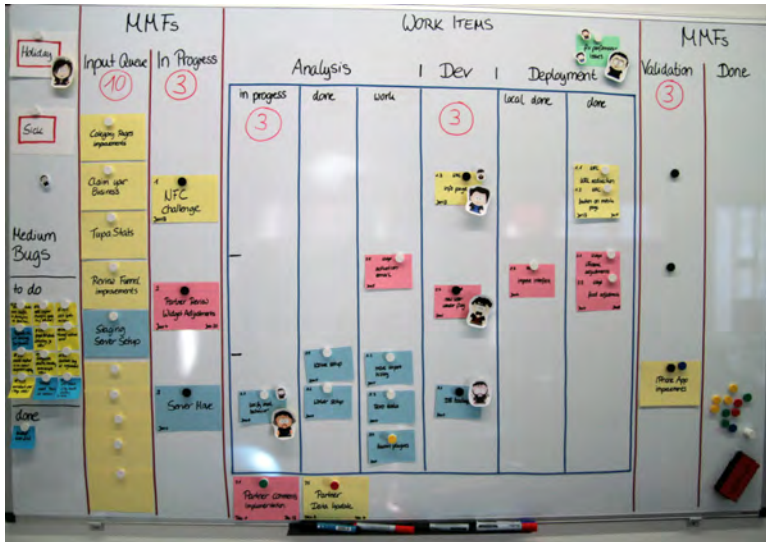
Tupalo's Kanban board

That's not sustainable, but the time constraints of TPM and Scrum didn't seem like they'd fit their team's needs either. Instead, they went the Kanban route. Their project manager made a slight variation on the three status categories by adding a "deployment" category, and used color coded Post-its to assign a "class," or value, to each task. Due dates were on red tasks only, so that in addition to seeing the whole project at once, developers could also instantly see priorities within each category.

The results were huge: a reinvigorated team that saw better quality work and faster delivery times. And Tupalo still uses Kanban. ### Traditional + Agile

Traditional Project Management isn't typically used in software development, since teams prefer to be able to respond to changes throughout the development process and have more flexibility. But instead of skipping it altogether, you could combine TPM's strengths with some Agile ideas for the best of both worlds.

That's what Panoptic Development, a software engineering agency,

has done, tweaking the traditional waterfall project management to fit their team's needs. The project manager, Shannon Lewis, had been so used to the waterfall model that she was familiar with it's constraints—and knew that typically, either quality, functionality or timeframes would have to be sacrificed.

Our Process

Requirements/ User Stories → Initial UI Design/ Wireframes → Iterative Software Development/ Design → Incremental Release → Beta Testing → Final Release

Testing

User and customer Feedback

1 or 2 week cycles
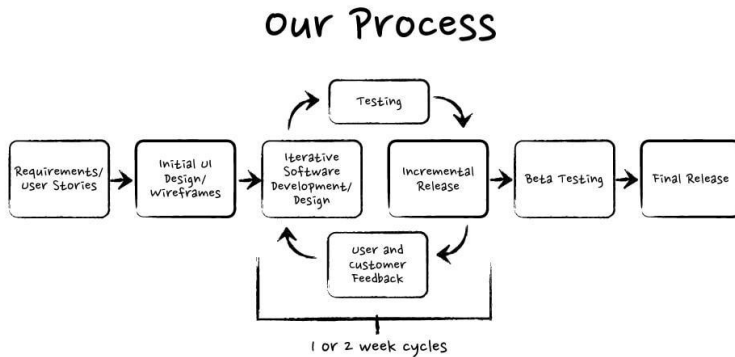
Panoptic Development's take on traditional project management

When Lewis started her own company, the tight budget, high-maintenance stakeholders, and unpredictable delays that a new firm brings wouldn't allow for a rigid, traditional approach. She integrated agile practices into her methodology by blending TPM's testing phase with Agile's short iteration cycles. They kept their application in a state where it could always be tested, instead of completing something for delivery and then moving on to the next part.

That let them be able to focus on quality while still adding function-ality they needed over time *and* hitting their deadlines—something neither TPM or Agile could have done on its own.

Six Sigma

There are plenty of scenarios in which the job is never really done, and one example can be found in Kentucky's recycling industry. The U.S. is the largest consumer of aluminum cans, which is why Secat Inc, a metallurgical research lab, teamed up with the University of Kentucky and the Sustainable Aluminum Industry to boost aluminum recycling rates.

They chose Six Sigma because data would be plentiful—they had statistics on everything from resident demographics to aluminum recovery rates. Saving money was also priority—every time a can wasn't recycled, it cost the local materials recycling facilities money, in addition to the costly effects on the environment.
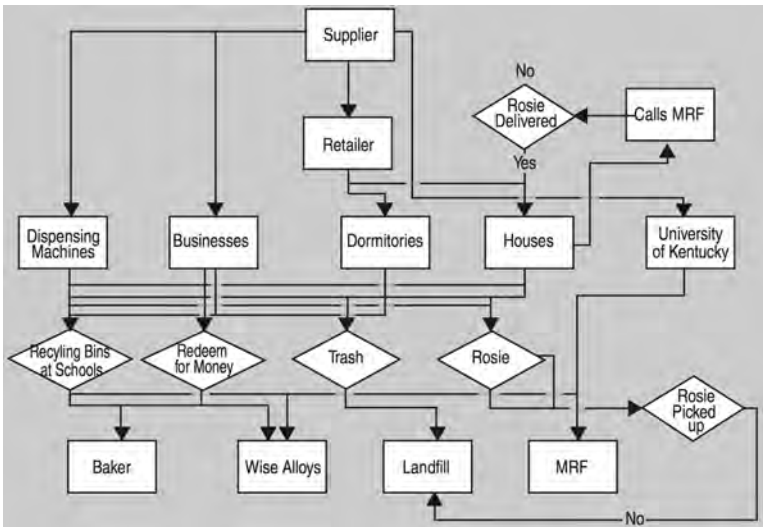
Secat's detailed Six Sigma workflow

Their strategy was to target the demographic that consumed the most aluminum, and then figure out where those people go. They identified places like sporting events, fraternity and sorority houses, and used them to spread awareness of recycling. Since the Six Sigma

methodology looks at defects—and how to demolish them—every can that went in the regular trash was considered a defect.

The team then measured the emerging statistics against their baseline to determine their campaign's effectiveness. They found several steps missing in their process (there's the continual improvement) that they then implemented, each time improving their collection rates. The control phase focused on keeping recycle rates up, and they made sure to monitor weekly charts, using data to verify the project control.

Altogether, Six Sigma fit Secat's ongoing work, and helped them continually improve a task that typically wouldn't seem to need project management.

The Best Project Management System for You

Project management may be a science, but it's not a precise science—there's no set-in-stone, one-size-fits-all project management method. You might be lucky and have a project that exactly fits one of these methods, or you may need to build your own hybrid system—or a brand new one, as the Apollo team did in their quest to get humans to the moon and back safely. What's important is that you use *something* to manage your projects, that gives your work structure and ensures you don't miss anything crucial.

With a project management system in hand, it's time to start managing your projects. But being a project manager is a complicated

job, one that requires a unique skill set that's perhaps most similar to that of a politician.

In the next chapter, you'll learn how to manage projects effectively, with tips from project managers on what they've learned on the job.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/project-management-systems/.

Written by Zapier Marketer Matthew Guay, with contribution from freelance writer Jane Callahan.

Image Credits: *Kennedy at Cape Canaveral by NASA via Flickr; GEM boxes photo via Wikipedia; Apollo 11 spacewalk image by NASA via Flickr.*

Chapter 3: The 5 Essential Skills of a Successful Project Manager

Project managers do a bit of everything. They fill in the gaps as utility players while drawing up plays for the rest of the team. They research tools, craft proposals, and present plans to the higher-ups. And, they manage personalities.

But which of those skills is the most important to the success of a project manager?

We asked individuals who have managed projects—either in a project or product manager role or outside of it—what they'd put at the top of their list, and received some sage advice for newbies and seasoned professionals alike.

Wield the Politician Inside You

Everyone has to learn how to "play ball" in the office; whether it's breaking bad news to your boss or handling a temperamental coworker. But it takes a certain grace to manage and please workers from every department—something project managers do on an ongoing basis.

Winston Churchill once said, "A good politician needs the ability to foretell what is going to happen tomorrow, next week, next month, and next year. And to have the ability afterwards to explain why it didn't happen." Heather Henricks, a freelance senior digital project manager who leads Ecology Action's marketing efforts, may well agree with him.

"At the end of the day, most highly-motivated project managers can perfect hard skills like technical acumen with systems, networks and platforms—it's the soft skills that really separate mediocre project managers from the masters," she says. Henricks spent her first seven years in project management at Microsoft, followed by ten more riding the startup wave at companies like Payscale.com and Allrecipes.com.

"When projects turn chaotic—and it's inevitable that they will from time to time—how do you rise above it all to get the best possible outcome? Are you a master at using humor and compassion to relieve the tension between teammates? Can you comfortably deliver hard news to those in authority in a way that doesn't rely on blame? Can you listen to feedback objectively and without ego? Can you

lead with the project's best interest in mind, and not get distracted by your own?

"You're the real hero when you successfully complete a project and everyone still likes and respects each other," Henricks says.

> "You're the real hero when you successfully complete a project and everyone still likes and respects each other."
> - Heather Henricks, Freelance Project Manager

Sharpening traits like diplomacy, objectivity and affability make for a great project manager when the going gets tough.

Paul Cothenet, who has worked as a product manager at a venture-backed startup for five years, and is now the CTO of MadKudu, an analytics company, says that knowing how to work well with others is especially important when working closely with science-based minds.

"I'll defer to one of the hardest defenders of project management out there: 'Most engineers don't know what a project manager does, and if they do, they usually don't know what a good one looks like.'"

In his work with engineers, Cothenet feels that most of them won't understand what it is a project manager does (and will probably dislike whatever he or she does, anyway). "And that's exactly why you're not in their shoes and they're not in yours," he says.

Since the technically-minded often think and communicate differently than those that don't, the real value of a project manager exists in engineers' blind spot.

"Don't try to convince them that they need you. The fact that they're not convinced is the reason why they need someone like you. That cognitive dissonance is the reality of the job, so get comfortable with it," Cothenet says.

With time, if you're good at what you do, engineers will "recognize it when they see it. Never try to shove it down their throat."

Henricks says there are many different times when she's had to bring out her inner politician. No matter what the scenario, though, she stresses one rule: "Don't put yourself in the situation of fixing people's conflicts, and don't engage in conversations that seem emotionally fueled."

She remembers a time when a designer had put together a wire frame mock-up of a web landing page for a client, but the account manager pushed back on certain design elements. The designer felt very attached to these features, and conflict ensued.

"So I went to the designer and I said 'Hey, I get why you designed the features that way, and I know it's hard to let go of. But I want to help you understand what the client wants,'" Henricks says.

She explained to the designer that the account manager was focusing on the client's best interest—a more simple user interface—and that the web design needed to be put against the goals of the project.

"Keep things factual; it's all about bringing perspective," she says. "Citing facts is a way of taking someone by the shoulders and shaking them out of their mind trap. It's almost cliche now to lead with a positive—but it works."
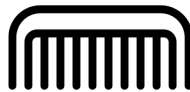
Use the Details to Shape the Strategy

Looking at the fine print can save time, money and and frustration. But a good project manager has to accomplish a delicate trifecta: appreciating the weight of the details, maintaining a top-level focus, and fitting everything into a coherent strategy.

Joe Corraro, a project manager with Siemens who oversees construction projects in New York City, says going through the details with a fine-toothed comb has made all the difference in how smoothly a job goes.

"If the engineer says we need 20 temperature sensors, but the documents says we need six, I need to know what the salesman said and what the construction plans say, so that when I'm asked '*how did this happen?*' in a meeting, I have my details straight and can give an educated answer—and a solution," Corraro says.

Relying on your team is one way to make sure things are double- and triple-checked. "I can't do it all," Corraro says, "so I know that if I have my team combing through it, we'll catch all the 'gotchas' that could lead to big problems."

"Your job is to sweat the small stuff and do the stuff other people don't want to do," Cothenet says. "That may sound menial to other people. But if you're reading this, it's probably what you like to do and one thing you're really good at."

> "Your job is to sweat the small stuff and do the stuff other people don't want to do." - Paul Cothenet, CTO of MadKudu, former Product Manager

But while the small stuff is important, getting tangled up in it can lead to trouble. Niki Gallo Hammond, a senior project manager with technology firm Jackson River, says that the best value a project manager can bring to a team is the ability to maintain the strategic perspective of the stakeholders.

"That doesn't mean avoiding the details completely," she says, "but do be wary of getting lost in them."

Good to know, but what's the best way a project manager do that? Get organized.

Johan Lieu, a product manager for Wufoo, says being "insanely organized" is a result of his need to know a product inside and out.

"Since it's impossible to keep an entire product in your head, you have to rely on outside tools like wikis, task trackers, to-do lists, whatever you like to use, to keep all that information," Lieu says.

But be careful not to drown in your to-do list, either: curating it in a manageable (read: realistically doable) is a great way to keep things on track.

"Maintaining a long backlog or to-do list will use up a lot of mental energy," Lieu says. "Be very mindful about adding anything and be obsessed about getting rid of stuff that doesn't matter."

Cothenet realized how out of control his task list was getting when he started cleaning it up every six months. There were so many unsavable, backlogged items that he started curating it every three months, which kept it much more manageable.

"If an item hasn't been updated in 3 months, just get rid of it," Cothenet says. "If it is really important, it will come back."

The unimportant tasks may be things like small bug fixes or feature requests which, even though they would certainly improve a product, may not be important in the big picture.

Communicate, Communicate, Communicate

The way Siemens' Corraro describes his to-do list, it'd seem like it's the backbone of his project management prowess—but it's actually

the constant communication behind his to-do list that makes it so effective.

"Actually, I call it my punch list," Corraro says.

New needs are communicated every day, so "you have to be able to adapt."

He spends the last half-hour of each day sitting down with the entire team to mark off what got done and what needs to be added to the master list. Then they organize everything by priority and who's responsible for what.

"Look at your timeline; if you need to do something by x date, and you aren't on target, what do you need to do to get there?" Corraro says.

Corraro also takes the time to see firsthand what might be holding something up. He'll revise the master list based on what he feels will clear the most roadblocks, then surface concerns at the end-of-day meeting.

Communicating clearly is just part of the process, according to Hammond; a good project manager chooses the right communication tool for the job. (e.g. Would you provide constructive criticism in person, or in an email?)

"Get really good at all forms of communication, and use them. Writing a status report, delivering a verbal presentation, and illustrating a plan may all be 'communication,' but each are appropriate at different times, and often those who excel at one could use improvement in others," she says.

In general, deadlines, assignments and complicated data are best in a written or illustrated form; challenges, bad news, and difficult conversations call for a verbal chat with a written follow-up.

> "I once had to address a room full of 50 CEOs and inform them that a software upgrade they were waiting

> for would be months delayed." - Niki Gallo Hammond,
> Project Manager at Jackson River

"I once had to address a room full of 50 CEOs and inform them that a software upgrade they were waiting for would be months delayed," Hammond says. "While they weren't happy about it, I think they saw how much I cared and that I wanted to find ways to minimize the impact it would have on their operations. And, they were able to voice their concerns to me immediately and we started brainstorming right there on workarounds. In many ways it ended up strengthening our partnership, which would probably not have happened if the message were delivered via email."

Never be afraid to over-communicate. It's better to pick up the phone or walk down the hall and make sure everything's going ok, than to just trust that things will automatically work themselves out.

Lead by Example

Even if the entire team is up-to-speed, remember that you, the project manager, are still in the lead. That means doing whatever it takes to get the project done, even if it's outside of your assigned duties.

A good project manager leads by thinking three steps ahead and knows that ultimately, how a project fares will reflect on them.

"Never let the ball drop, but keep a close score of who let it drop and fix the underlying issue as soon as you can," Cothenet says.

Anticipation of things that'll come up outside of the to-do list—followed by prompt action—make a project manager indispensable.

Good project managers "do the stuff no one else thought should be done, before they even think about it," Cothenet says. "Bad project managers try to become indispensable by creating unnecessary bottlenecks and taking knowledge hostage." Succeed by enabling others, and doing the things needed to push your team forward.

> "Do the stuff no one else thought should be done, before they even think about it." - Paul Cothenet, CTO of MadKudu, former Product Manager

As a product manager, Martin Müntzing, Podio's head of product, says his constraints are less about time and money and more about reaching a desired effect.

But even then, Müntzing's team needs some sort of direction. So they found a way to systemize thinking ahead, which they called "hypothesis-driven development."

"We formulate a hypothesis about what will happen with product implementation, and we do that before we start making any change," Müntzing says. "But with that comes a lot of stakeholder negotiations. They want to know what's going to happen before you even start; what the likely effect will be. But for us, it's more about the results."

From there, his team will hypothesize what will likely happen if they make a change, and then measure the results. This way, they're setting the project track up before changing anything—and they've used it for everything from landing page adjustments to pricing tests.

But they don't send every change through the hypothesis-driven development model.

"There are times when we know already that it's a good idea, it's been widely requested by customer, and needs to get done, and we don't feel the need to test it," Müntzing says. "With things that have a larger element of risk or uncertainty, we do the hypothesis."

As the product manager, Müntzing makes the final call about what they work on next, but it's important to get everyone's buy-in. "The smaller the organization, the more it's 'everyone's' team," he says. "So more people need to agree it's a good idea. But essentially, the product manager owns the execution."

Create Balance

Being a manager who also takes on some grunt work means that you get a bird's-eye view of every siloed department that's involved in the project. That's why most project managers say putting yourself in the other person's shoes adds perspective to team dynamics.

"As a project manager you are in a unique position of perspective that most members of your project team will not have," says Hammond. "It can be frustrating as a designer to see your designs mangled out of functional necessity, or as a programmer to see shortcuts taken due to time or budget constraints. Remember that each team member may value and protect their particular corner of the project. Take the time understand their personal goals and priorities for the project and for themselves, and help them understand the organizational or strategic goals of the project."

Make sure you acknowledge good work and provide positive reinforcement. Your success is the sum of your leadership plus all the work everyone else does, so show your team that what they do matters.

> "Remember that each team member may value and protect their particular corner of the project. Take the time understand their personal goals and priorities for the project and for themselves." - Niki Gallo Hammond, Project Manager at Jackson River

Cothenet says that balancing the short- and long-term performance of your team is one of the toughest parts of project management. "It is your job to fix other people's mistakes and avoid dropping the ball. But in the long term, your team will be dysfunctional if lazy people rely on you to do their job," Cothenet says.

"The biggest thing I've learned is to make my team members feel wanted and treat them like they matter and that I depend on them," Corraro says. "You can do this without letting people walk all over you. For example, if someone finished their work well and ahead of schedule, don't deduct a sick day next time they call in."

Cothenet says that there were many times when his team would take two weeks to plan something, start the sprint, and then see numerous plan changes—which can be a big morale-killer.

"As a project manager, it's your job to assess the importance of these recurring requests, examine if they really need to be met or not," Cothenet says. "If you are constantly disrupting your team and changing directions, your team will stop trusting you."

If you can master these five skills, there's no doubt your team will thank you for it. But if you don't want to stop here, Müntzing

suggests checking out Ben Horowitz and David Weiden's essay, "Good Product Manager, Bad Product Manager." Podio uses it as part of their project manager onboarding, and Muentzing says it's a constant source of inspiration.

Now that you know how to manage projects—and which project management systems you should use for your projects—it's time to dig into the best apps to manage projects.

In the next chapter, we'll take a closer look at one of the newer project management systems, Kanban, and see how you can use its card-based system to give your projects a workflow.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/project-management-skills/.

Written by freelance writer Jane Callahan.

Chapter 4: Kanban 101: How to Use Kanban Boards to Manage Your Next Project

Project management apps turn ambitious ideas into workable plans. They put lists, tasks and files into a centralized hub, so your team can collaborate. They're intricate, all-encompassing solutions.

And that power can make them feel, well, complicated.

Every task includes its own micro-tasks—the nitty-gritty details that help your goals move forward. It's like each task is a project of its own, begging for its own project management system.

Sometimes the individual tasks are as important as the overall project—especially when the project is, perhaps, an ongoing project like "Make more car parts" or "Write blog posts". When the job's never done, the system for completing each task is most important.

That's why Toyota invented the "kanban" system, and introduced it to their factory teams more than 60 years ago: to help make sure each part was made with the same level of care at every step. For that, kanban focuses on status instead of due dates. Each task moves through standardized project stages so teams can track what's in-

progress at a glance, and identify show-stopping bottlenecks.

It helped Toyota make parts that were consistently great, and ensured the parts were finished exactly when they were most needed in their factories. And today, kanban helps teams manage editorial workflows, push code through development sprints, streamline hiring processes, and much more.

It's the project management system you need to visualize your work. Here are 8 of the best ways you can implement kanban into your team, along with 8 great apps to pick from.

Kanban: A Short History

A kanban card on parts in a Toyota factory in the UK

Supermarket shelves. Car factory floors. Software development schedules. These unrelated tasks played a role in the creation of kanban, and for our purposes, kanban boards.

- **Supermarket shelves**: Think of the last time you went to a grocery store to buy peanut butter. When you arrived—no matter the day of time—it's likely there were jars still stocked on the shelves. Inventory in a grocery store isn't controlled by some strict schedule—it's ordered and stocked to fill customer demand. Jars of peanut butter are moved from stockroom boxes to shelves as they're emptied, and then new orders are placed as the stockroom runs out of inventory. It's a visual process, one that can be managed just by looking at store shelves.
- **Car factory floors**: If supermarkets can effectively rely on one action (customers buying peanut butter) triggering another action (stocking peanut butter on supermarket shelves), how could a car company do the same for its parts inventory? That was the question managers at Toyota were asking in the 1950s, when they sought to better manage their parts inventory. So they put in place the kanban (カンバン, which translates to "visual card") approach, which, like a shelf of empty peanut butter, relied on visual signals as products passed from one worker to the next. You'd know exactly where to pick up work on a part, thanks to its kanban card that detailed exactly what had been done to the part already.
- **Software development schedules**: Fast-forward to the 2000s, and Microsoft's software development team is look a more efficient way to fix bugs in their Team Server product. After starting out with a more complicated project management system, management consultant David Anderson helped create an early kanban system for software development that put tasks into a buffer (or list of things to be done), and let developers pick something to work on and then send it to the next stage of the development process by adding it to the next list.

As it turns out, almost every job has a process, steps that each task must go through. Peanut butter jars go from a supplier to a

stockroom to shelves; parts go from raw metal to a finished product on a factory floor; software bugs go from a feature request to raw code to a finished addition to the product. Kanban fits them all.

So what exactly is a kanban board, and how would you use one to visualize your projects and get tasks done more efficiently?

Kanban Board Basics

Whether offline in a 1950's Toyota factory or online in today's latest apps, kanban has three basic elements: board, list and card.

- **Board**: A board encapsulates a project or workflow; a traditional project management tool calls this a "project" or "workspace"
- **List or Lane**: A list or lane contains a set of related cards—typically those in the same stage of a process—in a titled column on a kanban board; a traditional project management tool calls this a "to-do list" or "task list"

- **Card**: A card houses an item related to your board and list, such as a task to be completed or a product to be made, and lives in a list on a board; a traditional project management tool calls this a "to-do" or "task"

With these elements as a foundation, the possibilities for how you employ a kanban board are as limitless as the ways you could use a spreadsheet. Create two boards, for example, to manage your company's next product launch. On the first board, your development team tracks launch progress by moving cards from list to list—To-Do, Doing and Done. On the second board, your marketing team categorizes planned launch activities with columns like Co-Marketing Ideas, Press Pitches and Internal Promotion.

That's only two of the many ways you could use a kanban board to organize your processes. We'll get to more. But first, let's look at the core kanban ideas and features to help you go from cards and lists to an organized workflow.

8 Kanban Board Features to Know

In a typical project management app, you'd list tasks, add comments or notes with more info, and check tasks off as they're completed.

Things work a bit different in a kanban board app.

Here are the eight most common features you'll find in a kanban board app—from the basics that are similar to paper-on-a-board physical kanban boards, to those that could only be possible in an app. The names and specifics of these features vary across apps—as you'll notice in the screenshots which come from a variety of apps—but their core functionality remains the same.

> *Note:* Each of the graphics in this section were orig-inally animations in the web version of this book. To view the animated versions, be sure to check out Chap-ter 4 of *The Ultimate Guide to Project Management* on the Zapier Learning Center.

1. Move Cards from List to List, Board to Board
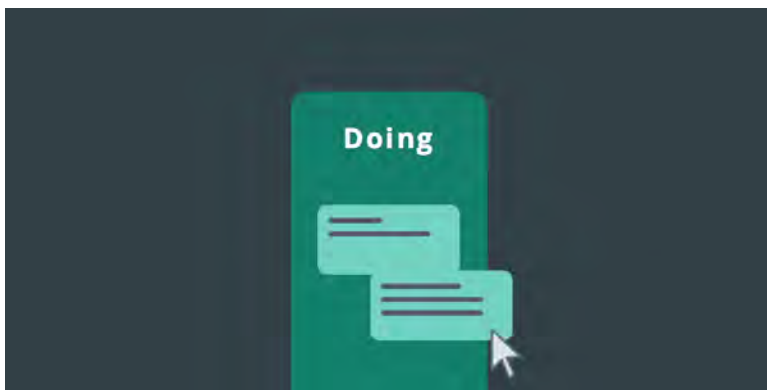
Moving cards between columns is vital to making the most of a kanban board. It's the one feature you'll use most—you'll likely move cards more than you even make new ones. In most kanban board apps, you can change the placement of a card at any time—move it within a list (up or down) or move it from list to list. To

do so, put your cursor over the card, then click, hold and move the card to the new location.

If you want to move or copy the card from one board to another, you'll typically find that option within the card's settings. And in some kanban board apps like LeanKit, you can change the layout of your columns, so you might be moving a card to a lower or higher column. Experiment and see where you can drag a card—you can't break anything.
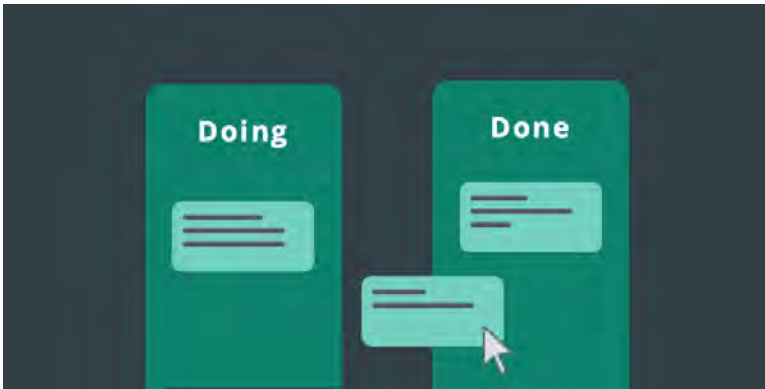
With all this movement, you'll sometimes find yourself needing to look back at the path the card took. To do this, locate the card's activity stream, likely on the card "back."

2. Invite Individuals to Boards, Assign and Subscribe to Cards
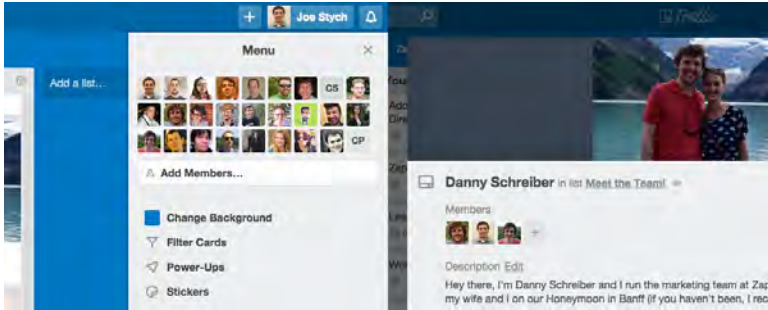
Left: Members of a Trello Board. Right: Members on a Trello Card

Like you'd expect from a traditional project management app, kanban board tools let you invite teammates, clients and others to collaborate on a project. This happens on two levels: board and card.

Each board has its own settings, including the ability to invite members. In Trello, for instance, you're able to invite *any* Trello user to a board. Or, if you're part of an organization (such as "Zapier"), there's a quick-list of fellow organization members that you can choose from. Otherwise, you can typically enter someone's email address to invite them to join a board for the first time.

When you add people to a board, they'll be able to add cards, move cards, leave comments on cards, edit cards and more. They'll also see the activity stream related to that board, so they can keep up with the project even if they're not a direct part of it.

Cards have members or assigned users, too, but with a different purpose: you'll add a member to the card (including yourself) to take or split ownership of the task. When you do so, you'll start to get notifications for activities related to that card. For example, if a board member leaves a comment on the card, the kanban board app lets you know when you're assigned to that card.
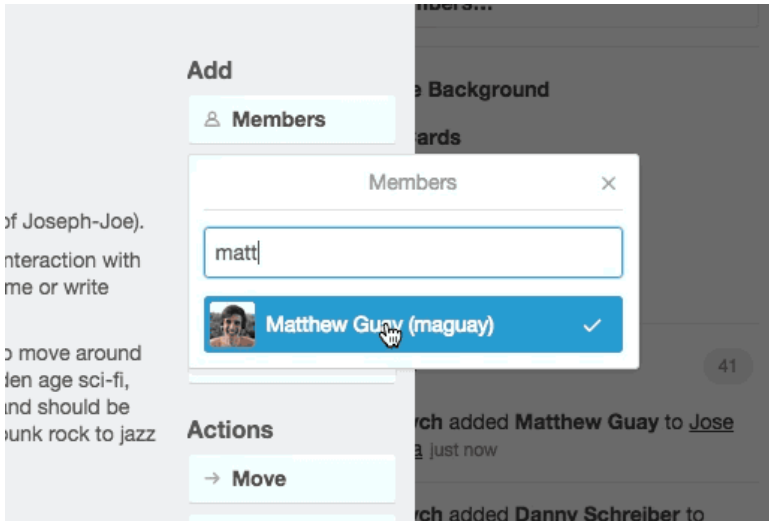
If you're not directly responsible for the activity described on a card, but you want to keep tabs on it, another option of many kanban board tools is to "subscribe" to the card. Subscribing to a card ensures you're notified of new card activity, just as if you were assigned to it. And in the same vein, if one of your cards are too noisy, you can unsubscribe from notifications to keep your inbox clear.

3. Add Notes and Hold Discussions on Cards

Using the card back functionality in LeanKit

Here's where a virtual kanban board is exponentially more valuable than a physical one: endless comments. Offline, it you're using a Post-it Note to track a task, you'll quickly run out of space to scribble things you need to remember. Online, a kanban card gives you limitless space to make note of what's needed.

Most kanban tools include a description field on each card, where you can add notes and attach related files. There's also usually an area to hold discussions with your teammates. And when you're writing up a description or leaving a comment, you're able to mention other members by @-mentioning the individual, like you would on Twitter.
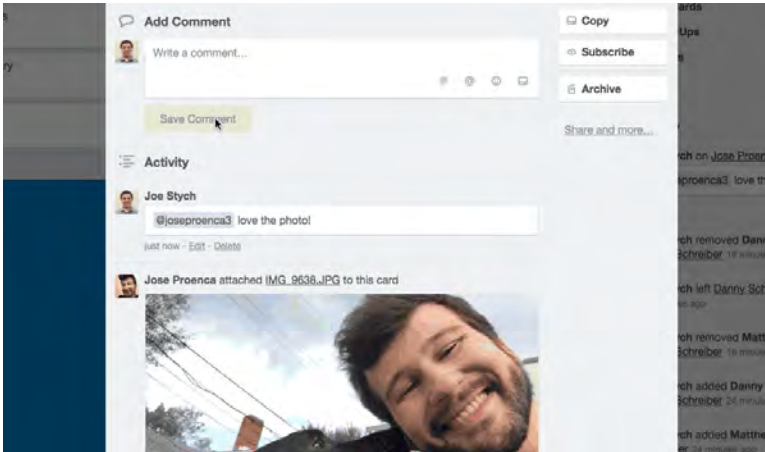
To access these two features, you'll need to tap into what some apps call the "card back"—look for a link to this additional set of features on the card itself, or just click the card and it'll likely open automatically.

4. Attach Checklists or Tasks to Cards
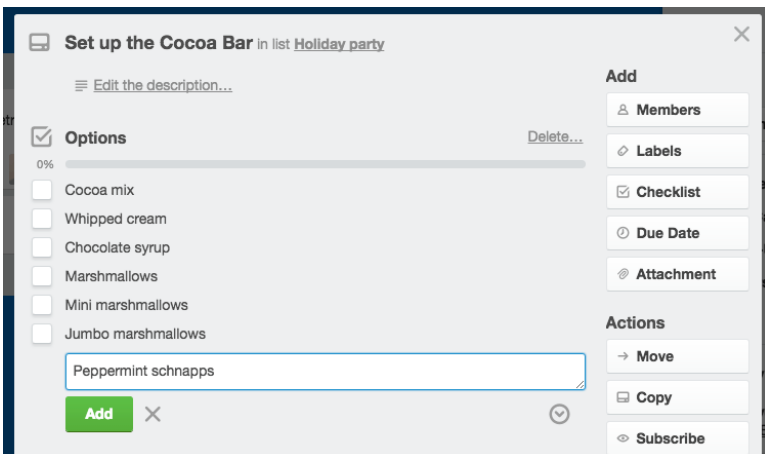
Your work is rarely a simple process, which is why tasks need checklists of their own. That's what you'll get with a kanban tool—each card can have one or more checklists or task lists. For example, a card on your "Press Outreach" kanban board might be titled "TechCrunch," and contain the following checklist:

[ ] Initial pitch email [ ] Follow up with more information [ ] Media assets delivered [ ] Coverage confirmed [ ] Coverage published

Depending on your kanban board tool, the card cover might show a completed checklist percentage that goes up as you check off tasks, making it easy to see where you are in a process.
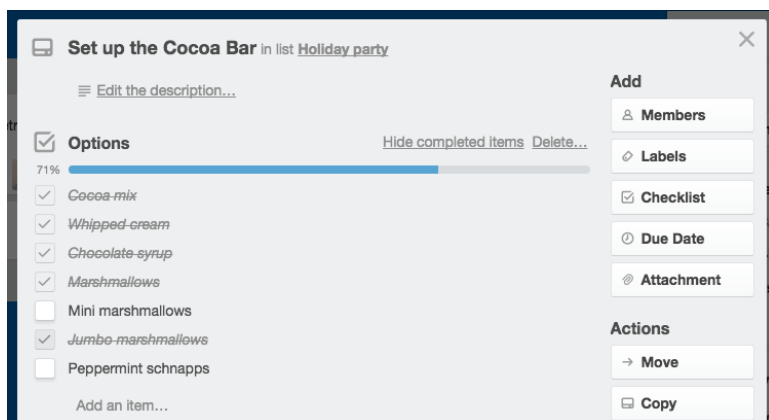
Like descriptions and comments, you can @-mention fellow board members in a checklist, too. At Zapier, we use checklists with mentions to assign roles in our editorial workflow. Every card has an "Editing" checklist with three tasks—micro edits, macro edits and newsletter copy—each assigned with an @-mention.

> **Related** Learn more about our editorial process and how we turn blog posts into books at Zapier.

5. Consider Work in Progress Limits
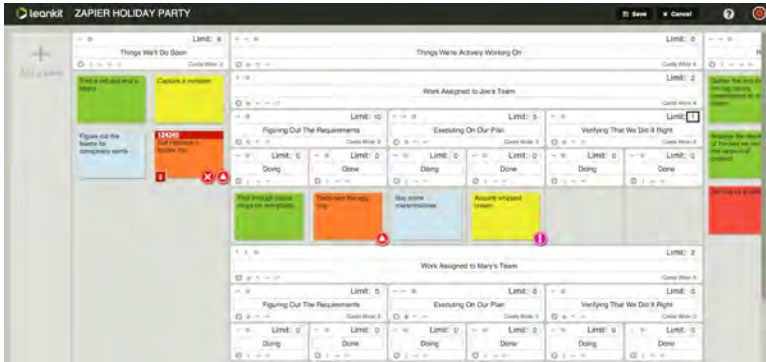
Processes can get overwhelming when there's too many tasks in a list at once. That's why some kanban apps let you restrict the amount of tasks you can include in a list with work in progress limits, or WIP (pronounced whip) limits for short. These constraints are applied to a column limiting the number of cards in that column.

For example, if I know that our blog writers at Zapier can only handle writing three posts per week, I would add a WIP limit of three cards to the column titled "Writing." You'll usually find WIP limit tools in the layout editor for your kanban board, and will just enter a number for the top number of cards you want in a list. If you add too many, the kanban tool will warn you there's already too many things to do—a quick way to know when you should work on other tasks.

6. Label or Tag Cards
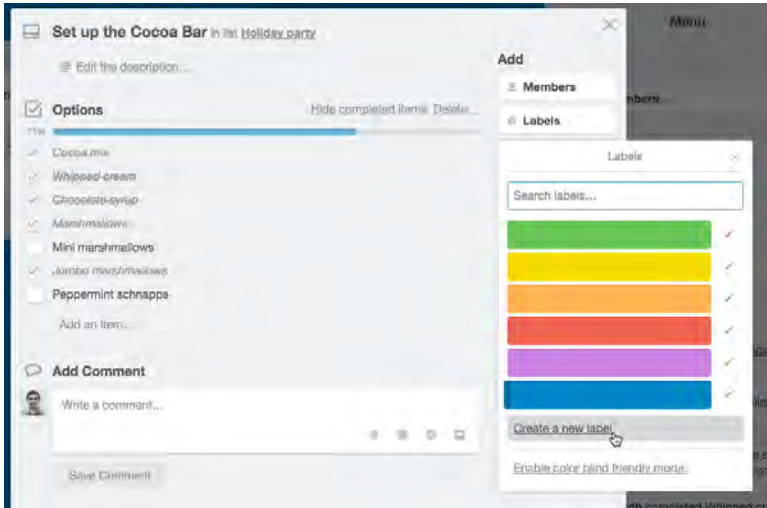
Let's get back to full-picture—the board view—and focus on another must-know feature: labels. Labels, also called tags, add another level of organization to cards in a list or board. If a card has a specific state that isn't covered by its position in a list, a label can be handy.

Returning to our editorial calendar setup, for example, we use labels at Zapier to denote if a post is written in-house, by a freelancer or by a guest. You could also use labels to note tasks that need your design or development team's help, perhaps, or to mark tasks' difficulty. You could even add multiple tags, to note when tasks need both development *and* design help, say.

Labels or tags aren't applied across all of your boards. Instead, they're specific to each board. You can customize each board's label colors and names so they fit that board's workflow perfectly.

7. Put Due Dates on Cards

Tasks without due dates often don't get done. So don't forget to set deadlines for your kanban cards. Just click the due date button—typically on a card's back or under a clock icon—and select the date when the task should be finished.

Most apps offer due date notifications, too. To get a reminder, you'll either need to be a member of the card or "subscribe" to the card—a feature available in most kanban tool apps. Then, your kanban tool will remind you when a task is coming up or overdue.

8. View Cards as a Calendar
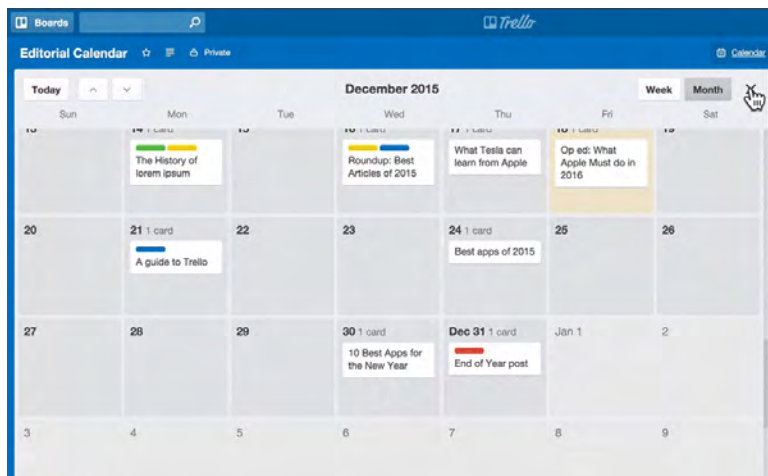
Beyond the default "board" view of a kanban board tool, many kanban apps let you toggle a calendar view. This quick switch—in Trello, for example, it's at the click of a button—makes it easy to visualize upcoming development deadlines, a publishing scheduling or product delivery dates.

And just like the board view, the calendar view lets you add, move and edit cards, too. Need to reschedule an overdue task? Just drag it to the new due date on your calendar.

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8 Kanban Board Apps

Need a tool to make your kanban boards? Here are eight of the best, each of which are easy to use but also include unique features to help your team be productive.

See the full table along with full app reviews on the
Zapier Learning Center.

App		Best for:	Price
Trello		The app that helped make kanban so popular today, Trello is an easy-to-use kanban board that lets you turn on only the features you need. With customizable backgrounds and emoji, along with new integrations, it can handle all of your kanban boards—from work to personal projects. See *Trello integrations* on Zapier	Free; $8.33/user/mo. Business Class plan for premium power-ups and team features
LeanKit		Every project's unique, so LeanKit lets you customize your kanban boards with different sized columns for the workflows you need. With detailed cards and reports, it's a kanban tool designed to help you collaborate on large projects easily. See *LeanKit integrations* on Zapier	Free for 3 users and 2 boards; from $12/user/mo. Standard plan for unlimited boards, templates, and more
Kanban Tool		Get your projects started right from a kanban card, with Kanban Tool's integration with Google Docs. You can add files from cloud storage, work on them, then track your progress with Kanban Tool's built-in time tracking and reports. See *Kanban Tool integrations* on Zapier	Free for 2 users and boards; from $5/user/mo. Team plan for unlimited boards and file attachments
Kanbanery		Make it simple to start new projects with Kanbanery's templates, which you can customize for your projects. Then, upload tasks with a CSV file, track changes in projects from GitHub, and keep track of everything with customizable email and RSS notifications. See *Kanbanery integrations* on Zapier	Free for 2 users; from $22/mo. for 5 users and unlimited boards
KanbanFlow		Make sure your team doesn't burn out, with KanbanFlow's built-in Pomodoro timer that helps pace your work. You'll also never miss any part of a task, with detailed sub-tasks right on your cards in your dashboard. See *KanbanFlow integrations* on Zapier	Free; $5/user/mo. Premium plan for dashboard and calendar views, file attachments, reports and more
MeisterTask		Rely on mind maps to help your team brainstorm new ideas? Turn those into actionable tasks with MeisterTask, a Kanban app from the team behind MindMeister. It'll help you do more, with automated actions and task relationships so you'll know if a former task needs done first.	Free; $9/user/mo. Pro plan for unlimited integrations and workflow automation
Blossom		Want more visuals than just your kanban boards themselves? Blossom gives you detailed analytics and email reports about your projects. It also deeply integrates with GitHub for a simplified development workflow.	From $19/mo. Startup plan for unlimited projects and 5 users
Swift Kanban		If kanban itself isn't enough for your team, Swift Kanban incorporates Lean development sprints to give your tasks more specific deadlines. You can also link cards, track time on tasks in cards, and more for advanced project management in a kanban board.	Free for 2 years for up to 10 users and boards; from $7/user/mo. for custom card types, templates, and reports

There's more, too. You'll find kanban board tools inside many

apps today—or as companion add-ons you can easily install. Visual Studio Online includes a kanban view for your work items, while tools like Waffle.io can turn your GitHub issues into a kanban board automatically. Productivity tools, including task managers like Flow and project managers like Zoho Project, also often include kanban views as another way to sort your tasks.

Or, for simpler projects, you might not even need an app. Instead, you could repurpose a whiteboard as a makeshift kanban board. Draw your own columns, use post-it notes for your cards, and you'll have a quick way to visualize your projects and start pushing each task towards the last column for completion.

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6 Ways to Test Drive a Kanban Board

Kanban boards were popularized first by factories and later by software development teams. Thanks to their flexibility, kanban apps can now be found everywhere—from the boardroom to your home office. Here are six of the many unique ways kanban boards can be used to get more done.

1. Manage Personal Tasks

Collaborating in a kanban board seems like a given, but it's not a requirement. A kanban tool can be used all on your own to manage your personal tasks. The simplest way to get started is to create the standard lists: To-Do, Doing and Done. Or add a *backlog* list, for when a task or work item doesn't fit into one of the three categories. That's how Pocket founder Nate Weiner uses Trello.

"I have a board that I call The Hopper, (with lists) Today, Tomorrow and This Week," Weiner says. Before using the personal kanban

method, the Pocket CEO relied on his email inbox as a checklist. Finding that a "terrible place to put tasks," he tried several to-do apps, but none of them stuck.

That is, until he made a kanban board. "Anytime I come up with something, I just hop into the app, drop it in The Hopper and then at the beginning and end of the day, I can recycle these things and move them around as need be," says Weiner.

You can add automation to Weiner's process by relying on Zapier to create a Trello card when you star or label a Gmail email, or file away an Office 365 email.

- Create Trello cards from new starred Gmail emails
- Create Trello cards from new labeled Gmail emails
- Create Trello cards from new Office 365 emails in inbox or folder

Moreover, if you have a routine task you need to complete, rather than re-adding it daily, weekly or month, rely on Zapier.

- Create Kanbanery task cards every day
- Add weekly cards to Leankit
- Create Trello card monthly at scheduled time

> For more on making personal kanban boards, read Alan Henry's Lifehacker post, "Productivity 101: How to Use Personal Kanban to Visualize Your Work."

2. Build an Editorial Calendar

There's apps to help manage your editorial calendar, but rather than adding more software to your workflow, consider using a kanban

board to manage content. At Zapier, for example, we use a Trello board to keep our publishing pipeline flowing.

Our "Editorial Calendar" board has six lists—To Write/Assign, Writing, Editing, Ready, Publishing and Promoting—and each card represents a piece of content. The member of the card is the content's author, unless the post has been assigned to a freelancer, in which case the member is the freelancer's contact and the card is given a green label to note it's a "freelancer" post. When a card moves into the "Editing" list, we add a checklist with three tasks—Macro Edits, Micro Edits and Newsletter Copy—@-mentioning a team member beside each.

Before implementing the kanban workflow at Zapier, we didn't plan posts more than a week out, and were always scrambling to get content published on time. The Trello board, with its checklist, card members and due dates, has helped changed the way we work at Zapier.

And once an article has been published, we use a Zapier-powered Trello to Slack integration to let the team know there's a new post on our blog automatically whenever a card's moved into our Promoting list.

- Post new Trello activity to a Slack channel or @slackbot
- Get Slack notifications for Trello cards created or closed
- Get Trello notifications in Slack

Or, if you're using another kanban board app, here are some Zapier automations to help your team know as things move through your editorial calendar.

- Share new LeanKit cards as HipChat messages
- Create KanbanTool cards from starred Slack messages
- Send emails when KanbanFlow tasks are moved

For a tutorial on using a kanban board for your content planning, read "How to Create an Editorial Calendar Using Trello" on the BlueGlass digital marketing blog, or "Moved To Published: Using Trello As An Editorial Calendar" on Trello's blog. For a breakdown of how a kanban board app differs from an editorial calendar tool, see WPCurve's post, "Trello vs CoSchedule: Editorial calendar review for content marketers."

3. Gather Content Ideas

Similarly, Robby Macdonell, vice president of product development at productivity tool RescueTime, relies on a kanban board to keep a repository of future blog post ideas. He employs just two list: "Possibilities" and "Done."

"I'm constantly seeing articles or blog posts about working smarter or happier, and many of them have ideas that I'd like for us to explore further on the RescueTime blog," Macdonell says.

"I usually see these articles in passing, don't have enough time to fully digest them, and when it comes time to meet with our content team, I've completely forgotten about them," he says. "Now, I just save the article with Pocket, give it a tag, and it automatically ends up in the 'Ideas for Future Posts' board."

You could use Zapier integrations to create kanban cards from your company mentions, RSS feed posts, emailed-in idea suggestions, and much more, so you'll always have ideas to start with—and then, you could get them published with your Kanban-powered editorial calendar.

- Create Trello cards from new tagged Pocket items
- Create Trello cards from new favorited Pocket items
- Create Trello cards from new Pocket items

4. Share a Public Road Map

Customer support apps often include forum tools, where users can suggest and vote on new features, functionality or add-ons. The team behind Front, a shared inbox app, knew the importance of that customer interaction and wanted to offer their users something like this. Rather than fiddling with a new tool, though, they made a modification to the Trello board where they were privately storing user requests—they made it public.

"It was a big decision to make and we put a lot of thought into it," Mathilde Collin, Front CEO, writes on the company blog, "but once we opted for it, it literally took us 2 minutes to launch it."

On top of giving visibility to all, they added a Trello feature to allow for public votes on individual cards to gather input from users.

"The public roadmap has already helped us collect valuable feedback," Collin writes. "For example, the native iPhone app was far more urgent than we anticipated, and 4 times more requested than the Android app: we instantly added it to our next product cycle."

Front's not alone in using a kanban board for a public roadmap. Trello itself does the same, and they offer a guide to taking your company's plans public, too: "Going Public! Roadmapping With A Public Trello Board."

When it comes to filling up your own roadmap with potential ideas, Zapier can help by creating cards in your kanban app from starred Slack messages, new Evernote notes in a specific notebook, new Asana projects and more.

- Create Kanbanery task cards for new notes on Evernote
- Create KanbanFlow tasks from starred Slack messages
- Add new Kanban Tool cards for new projects on Asana
- Create LeanKit cards from GitHub issues

5. Track Your Sales Pipeline

At some point, you'll find you need a CRM app, a customer relationship management system that keeps you and your team on top of your sales pipeline. Until that time comes, though, you can get much of the same features with a spreadsheet CRM or a contact-centric kanban board. It's the latter that entrepreneur Grégoire Gilbert found to work best early on for his team.

"There's a lot of CRM and sales pipeline solutions out there. From platforms aiming at freelancers, to SaaS targeting sales teams. Most of them look good and could have probably worked for our tiny team," say Gilbert. "Although, being a pretty convinced Trello user already, I decided to give it a try for managing my sales pipeline."

He set up his company's kanban board with a list for each stage, from "Contacted Us" to "Won," "Contact again later" or "Lost." He then used labels to mark if a prospect needed to be contacted or there was another action that needed to take place. When the contact reached the list called "Meeting arranged," Gilbert employed the card's checklist to note the tasks he needed to complete in order to prepare for the in-person sale, and added the in-person meeting's date as the card's due date.

Gilbert's system wasn't set in stone. That was part of the plus of using a kanban board tool: it was customizable to his team's evolving workflow. And he's not only one he's used Trello as a simple CRM—EntreLeverage, an administrative support agency, for example, has heralded the system, too.

If you're considering setting up a kanban board app for a sales pipeline, rely on Zapier when it the time comes to start pulling in leads. Zapier can turn your emails, contacts, proposals and more into kanban cards, or it could notify you when cards—ahem, contacts—reach a certain stage.

- Create LeanKit cards from Formstack submissions

- Created new detailed events on Google Calendar for new Kanban Tool cards
- Create Trello cards from new WooCommerce orders
- Create KanbanFlow tasks from new Google Sheets spreadsheet rows
- Create cards on Kanban Tool for updated Freshdesk tickets

6. Hire Faster

You're hiring for one position, then two, then four. Sorting through applicants in your inbox is manageable when you're just starting to hire, but before long you'll need an applicant tracking system—an app that organizes candidates, allows you to assign team members to hiring tasks and keeps applicant information easily accessible. There's well-built software for this task, such as Workable or Breezy, but a kanban board with some Zapier automations can also be a great solution.

To get started, set up a hiring inbox with your Google Apps account, and then use Zapier to create cards from each new email received. You can set up the integration to use the email subject as the card's title, include the attached resume as a card attachment, and pull out the email body, contact info and any other details and add it as the card's description. Then, you can use columns to note each part of the hiring process. It's not a full-fledged applicant tracking system, but it's bounds better than an overflowing inbox.
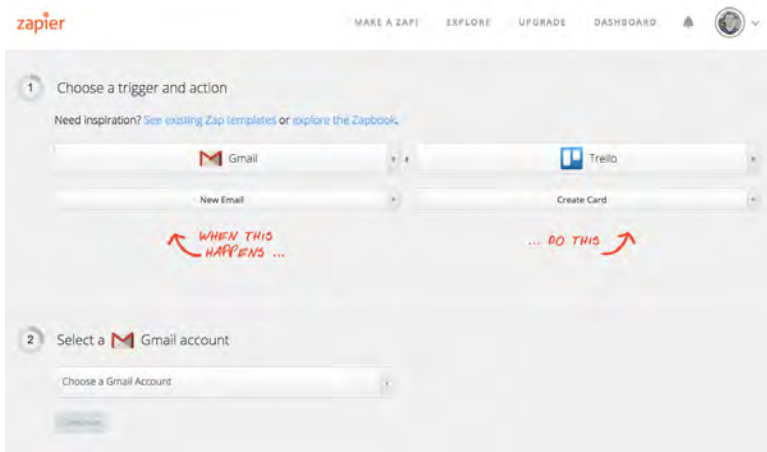
A Zapier integration to add hiring data from an email to a kanban card in Trello

It's also how a number of teams are already processing their applicants. "Back in the day we found it very stressful to keep track of our inbound applications," says Michael Börner of digital agency Edenspiekermann. "Making decisions on applications is decentralized at Edenspiekermann, and we needed a way to send the applications to our colleagues to get proper feedback."

"Now, we generate a Trello board for each job posting, and define a Zap that way," says Börner. "We are sending the inbound application message to an email address that splits the mail with its attachments and adds it as a card on the corresponding board. Further, the Zap assigns the right people to the cards, and from there, we take it in Trello. This way we save time and get a well-handled process."

- Create KanbanFlow tasks from new labeled Gmail emails
- Create new Kanban Tool cards for new emails
- Create Trello cards from new IMAP emails
- Turn new Office 365 emails into Trello cards

For a step-by-step guide to setting up Trello as an applicant tracking system, read entrepreneur Eric Sui's tutorial, "How You Can Use Trello to Organize Your Hiring Process."

Create Your Own Kanban Boards
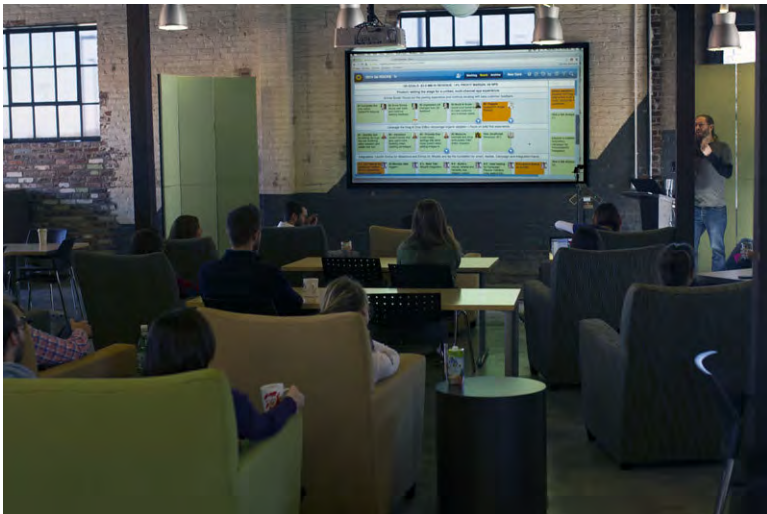
Emma reviews its Leankit board during a team meeting

The team behind email marketing app Emma relies on Leankit to monitor progress of its team's biggest goals. Jessica Crabb, a product designer at Pivotal Labs, turns to Trello to schedule and record user research. Brian Cervino, a Trello team member, uses his company's product to plan his meals—one of dozens of kanban board uses highlighted by the Trello team.

Kanban board apps can be called on for projects big and small, individual and team efforts, one-time or ongoing work. These

tools offer much of the same functionality of a traditional project management app—or a CRM, applicant tracking system or editorial calendar tool. You'll just need time to make it your own.

Create boards for your next projects, add lists and labels that fit your workflow, bring in all of your tasks, and give it a try. Customize until everything feels just right. It might take a bit of time, but once you have your board title, list names and card formats in place, you'll be ready to tackle your first task. And before you know it, you'll be making more kanban boards for your next tasks.

Kanban boards aren't the only way to manage projects. There's a world of project management software, with tools of all shapes and sizes that can help you plan projects, assign tasks, schedule release dates, and keep track of everything in one place. Some are simple, with just team-focused to-dos. Others do everything, merging chat and invoicing with projects and documentation, for a one-stop-project-shop.

In the next chapter, we'll look at the 50 best project management apps, with enough different tools to fit almost every possible project need—and then some.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/kanban-board/.

Written by Zapier Marketer Danny Schreiber.

Image Credits: *Toyota factory photo by Toyota UK via Flickr.*

Chapter 5: The Best Project Management Software: 50 Tools for Team Task Management

To-do lists alone aren't enough to send a man to the moon, build a pyramid, and create the device you're reading on right now. Humanity's greatest achievements—and your next project—need a workflow, a way to break a project up into achievable chunks, make sure each part is completed in a consistent manner, and ship the finished project on time.

That's what project management apps are for. They're tools to break your project down into achievable steps and give your team a workflow to turn the ideas into reality.

Over the past four months, we've tested more than 75 project management tools. These systems come in every shape and size, from simple team task management apps to advanced collaboration software that combine hundreds of tools into one. What's most important, though—and what we looked for in the apps we

recommend—is that they help create a workflow for your projects
beyond a simple checklist.

After an exhaustive look at the top project management software,
we've pared down the field to 50 apps across four categories, from
core project management to customizable project tools. No matter
the tool you pick, if it's on this list, it can help you properly manage
the workflow to ship your next product or unveil your new service.
The apps are diverse, with as many or few features as you'd like—
but they all let you work the way that fits your team the best.

> **Quick Reference Guide:** Get a free PDF "cheat sheet"
> with a detailed list of features for each of the 50 apps
> from *The Ultimate Guide to Project Management*'s
> page in the Zapier Learning Center.

How to Pick the Best Project Management App

Completing a project can often feel like climbing a mountain.

Think of something you want to accomplish: washing your car this weekend, moving to a new city, or perhaps climbing Mount Everest. The car task is easy: just go do it, and a half-hour later it'll be done.

Moving is a bit more tedious: you'll need to find somewhere to live, pick a deadline to move, pack your stuff, cancel utilities, turn them back on at the new place, rent a truck or hire a moving company, unpack everything, and settle in. And climbing Mount Everest is so hard, you'll spend over $35,000 and need to hire a whole team of people to help you.

Some tasks at work—like cleaning out your email inbox or writing an internal memo—are like washing your car. You might need to list all the random items you need to tick off, but each task doesn't need much more attention than that.

Shipping something new, though, is much more difficult. Simpler project might be like moving, while more complicated projects can

feel like conquering Mount Everest. You need to plan every step,
set deadlines, figure out when each task needs to be finished to hit
that deadline, track the time spent, collaborate with your team, and
much more.

The best project management tools help you do all of this in one
place. Some keep it simple, with just your tasks and workflows,
while others add chat, forums, invoices, expense tracking, and more
functions for a full picture of your projects.

In this roundup, every project management app at least lets you
break your project into steps, with a workflow to help you get
everything done. Some, like Trello, are simple, focused on just your
tasks and the workflow to finish them. Then, others like Zoho
Projects include *everything*, as a one-stop-shop for your project
needs.

Beyond a workflow for your tasks, here are some of the features
you'll find in these project management apps:

- **Milestones** to list broad deadlines for core parts of your
  project
- **Gantt Charts** to show the time each part of a project will
  take
- **Kanban Boards** to set a process for tasks
- **Calendars** to show events, deadlines and task due dates

- **Status Updates** to let everyone know how a project is going
- **Messages** to send email-like messages to your team
- **Live Chat** to discuss the project with your team in real-time
- **Time Tracking** to log time spent on tasks
- **Invoicing** to bill clients for the time you spend on their projects
- **Notes or Documents** to share important info about a project
- **Dashboards** to get a quick overview of due tasks, new messages, and project progress
- **Reports** to look back over a project and see how things went
- *and more.* There are project management tools with customer relationship management functions, payment services, and wikis built into the app.

You might need some of those features—or you might need them all. The best app for your team depends on your project management system.

Do you work best with strict deadlines, using milestones to keep your team on track? Then a traditional project management tool with Gantt charts—calendar-style lists that show when each task should be completed and what overlaps—might be best. Prefer to take each task through the same process? A kanban board with columns for each stage of your process might fit your needs better. Working on a variety of different projects, some that need more process and others where deadlines are king? A hybrid tool with multiple views is likely the best option for your team.

Or, you might find that a full-featured project management is more confusing than it's worth. You already have a team chat app, calendar tool, time tracker, and documentation hub. All you need is a tool to manage your projects—and a way to tie your apps together.
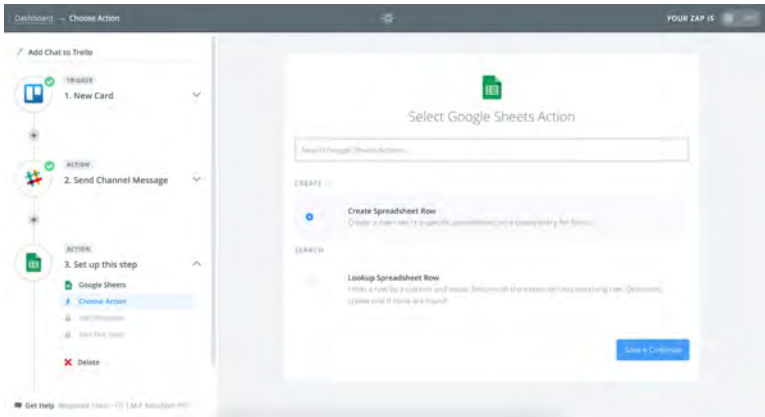
App automation tool Zapier is perfect for that. It connects to most of
the apps in this roundup—along with more than 600 other popular
tools like Slack, Google Calendar, Xero, an Twilio. Just connect
your project management app to Zapier, then create integrations
to automatically add tasks to your calendar, notify your team in
chat or via SMS, log projects to an invoicing app, and much more.

Here are some quick ideas to help you get started, or head over
to the Zapbook to find ways to automate your favorite project
management app:

Add Live Chat to Project Management Apps

No matter how simple or complicated your project is, ever task
likely needs to be discussed. From the straightforward assignments
to thorny issues like bugs, a simple checkbox isn't enough to make
most decisions.

So connect your project management app to your team chat tool
with Zapier, and start discussions about tasks, projects, and work-
flows automatically.

- Share new Teamwork messages on Slack

- Share new Wrike tasks on HipChat
- Create Producteev tasks from Slack messages

Create New Projects Automatically

Projects don't start themselves. They come from brainstorming sessions, contact forms, bug reports, and long-term goals.

Zapier can turn all of those into projects, using data from forms, bug reports, and spreadsheet entries to start new projects. Use templates to automatically add tasks and milestones, and you'll never have to plan routine projects manually again.

- Create Basecamp project from new Highrise project
- Use new Wufoo forms to create new Project Bubble projects
- Create Toggl project for new Redbooth projects

Track Time and Send Invoices from Any Project

Want a simpler project management tool, but still want to track time and send out invoices? Zapier's here to help. It can start new projects from your invoicing tool, then log time spent on tasks back to the same app. Once it's time to invoice for your projects, you'll just have to open the time tracking or invoice tool, and all the data will be there automatically.

- Use new Project Bubble clients to create new contacts in Xero
- Add new Pivotal Tracker Stories to Harvest as Tasks
- Add time entries in Teamwork based on Toggl time entries

Keep Records of Completed Tasks and Projects

Many project management apps let you create reports about your tasks, but what if you want something more customizable? Perhaps

you just need a simple log of completed tasks—or maybe you need
to create detailed charts and graphs for your postmortem meeting.
Or you might want a real-time dashboard that shows your team's
progress.

Just connect your project management app to a notes, spreadsheet,
or dashboard app with Zapier, and you'll have auto-generated
records and logs of your projects in the format you want.

- Create Personalized Documents from Podio with WebMerge
- Create rows in Google Sheets spreadsheets from Zoho Projects
  tasks
- Record new Producteev tasks in an Evernote note

Now, it's time to find the perfect project app for your team. In this
guide, we first present with the simplest project management tools,
ones that are focused *solely* on your projects. That section starts
with list apps, then looks at Gantt Chart, kanban board, and Scrum
sprint-focused apps, each section opening with the simplest and
ending with the more advanced apps in the category. Then, you'll
find a list of project apps with chat apps and messaging tools for
better communications, followed by client-focused tools that add
time tracking and invoicing to project management. And at the end,
you'll find the most advanced, customizable project management
tools, ones that when configured could manage everything in your
business.

There's something for everyone—so think about what your projects
need, then look through the tools below to find one that fits your
needs.

Explore these apps in a presentation with our Slideshare
roundup of the Best 50 Project Management Apps.

The Best Core Project Management Apps
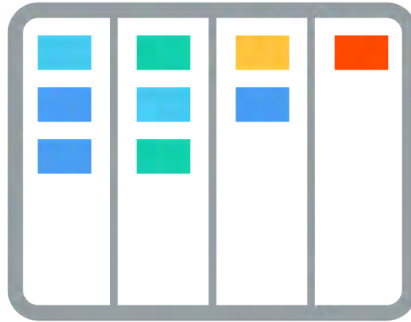
Project management apps come in all shapes and sizes, and they each have their own unique way of helping you get things done. These apps are no different, but they do have one thing in common: they're simple.

Each of these project tools let you organize tasks into workflows, assign them to team members, track task progress in some way, and communicate via comments on the tasks. You'll find some extra features—calendars and reports and customized views—but for the most part, these tools are focused just on the tasks that need completed to get that project shipped.

Here are the best apps focused on task lists, Gantt charts, Kanban Boards, and Scrum Sprints for your projects.

Task Lists

Need to list tasks and quickly arrange them in a workflow? These apps are some of the simplest ways to start managing your projects.

App		Best to:	Free for:	Paid plans from:
Asana		Manage team to-dos with updates and progress graphs to keep everything on track.	15 users	$5/mo./user
Dapulse		Visualize each task's progress with labels that show the results of each task's workflow.		$25/mo. for 5 users
Insightly		Focus on contacts and projects together in one app.	2 users	$12/mo./user
Toodledo		Outline everything your team needs to do in task lists with custom fields.	∞ private tasks	$14.99/yr./user
Allthings		Write down tasks in simple lists, add extra data with custom fields, then turn those fields into kanban lists.	∞ users, 5 projects	$9.95/mo./user

Asana

Best for: a more advanced to-do list
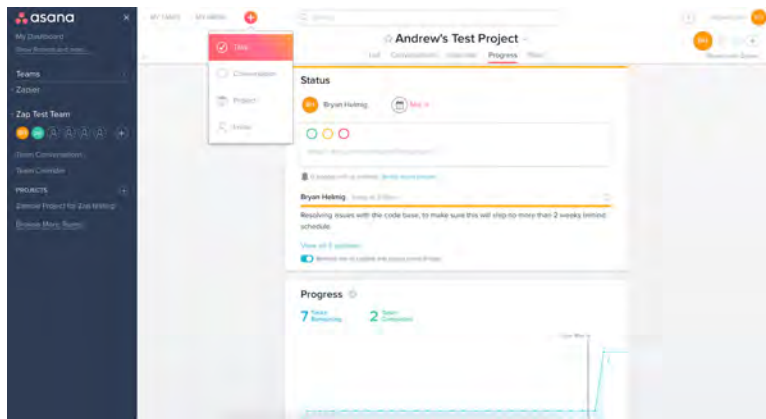
To-do list apps are often too simple for complicated team projects—but not Asana. It's easy to use, with to-do list based projects focused on due dates. Then, the dashboards and status updates in Asana turn it into something that can manage more complicated projects.

Just list everything you have to do into Asana project lists, add sub-tasks, notes, and tags to keep track of everything in the task, and check off things as they're done. Then, head over to your dashboard

to see a quick graph for each project's progress, or add a status update to let your team know how everything's going.

- **Asana Price**: Free for up to 15 users; from $5/month per user Premium plan for full features.
- For a deeper look at Asana's features and pricing plans, check out our Asana review.
- See Asana integrations on Zapier.

Dapulse

Best for: visualizing exactly how each stage of a workflow went
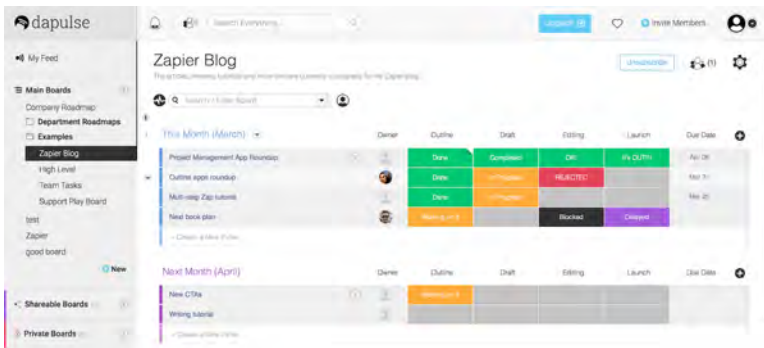
Each step in your workflow would go perfect, ideally, and you'd just check off each task and complete the project. But life happens, and sometimes things don't work out. That's why Dapulse replaced the checkbox with a list of workflow stages after each task. When you start out projects, list the things you need to do, then add columns after the task lists for the stages in your workflow. Each stage includes colored labels, which you can customize for the possible ways your projects can go—perhaps green would be *Done*, black could be *Blocked*, and red could be *Rejected*.

Then, at a glance, you can see exactly where each part of your projects stand. Update tasks with just a click, or add comments to

a task's stage to ask a teammate what needs done to get this task completed. It is an easy way to add structure to projects, without having to make complicated workflows and boards.

- **Dapulse Price**: From $25/month Basic plan for 5 users.
- For a deeper look at Dapulse's features and pricing plans, check out our Dapulse review.
- See Dapulse integrations on Zapier.

Insightly

Best for: projects deeply linked to your contacts
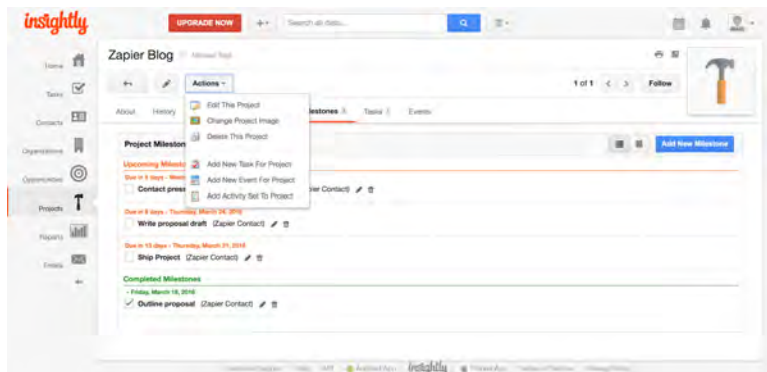
It's a CRM, but it's also a project management tool that can help you keep track of your tasks, with pipelines and milestones to keep you on schedule. Insightly is a great tool for managing projects that are deeply tied to your clients and customers. Start out with the CRM, nurturing potential projects with your clients until you win a new job. Then, link those projects and tasks to their respective clients, with their contact info only a click away so you can easily get in touch with them.
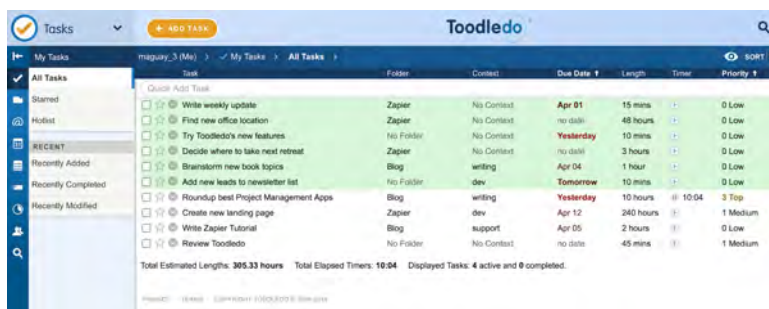
There's two ways to manage projects in Insightly: with pipelines or milestones. Pipelines let you set a broad workflow for your project,

with tasks and events that will automatically be added to the project as you hit a particular stage, making it easy to re-start similar projects in the future. Milestones, on the other hand, let you list major events along your project's schedule, to keep the finish goal in mind. Either way, once the project's finished, you can log it to your contact's profile and start working on winning the next big project.

- **Insightly Pricing**: Free for 2 users; from $12/month per user Basic plan.
- For a deeper look at Insightly's features and pricing plans, check out our Insightly review.
- See Insightly integrations on Zapier.

Toodledo

Best for: task lists with custom fields

Spreadsheets are flexible to a fault—they're so easy to use, it's hard *not* to use them for everything, even managing complex projects. If you want a spreadsheet-style tool that's more focused on projects, Toodledo's customizable task interface lets you do something similar, with collaboration tools and notifications you'd expect from a project app. Just select the features you want on

tasks—timer, length, goal, and status—then add the tasks you need to complete.

Then, structure your tasks in the Outline mode, where you can drag-and-drop tasks into the order you want, with as deep of a hierarchy as your projects need. There's also a habits tool, to keep your team focused on checking off work in the most important areas each day, and customized notifications so you'll know about due tasks ahead of time. It's simpler than the average project management tool, but lets you make a customized workflow with as much structure and guidance as you need.

- **Toodledo Price**: Free for core features and unlimited tasks; from $14.99/year per user Silver plan for collaboration and subtasks.
- For a deeper look at Toodledo's features and pricing plans, check out our Toodledo review.
- See Toodledo integrations on Zapier.

Other great team to-do list apps include Wunderlist, Todoist, Producteev and Nozbe—they're more focused on plain to-do lists, and don't include as many project-focused tools, but might be great options for your simpler projects. Or, check out the other best to-do list apps for other simpler project tools.

Allthings

Best for: writing tasks in a list then organizing them on a kanban board
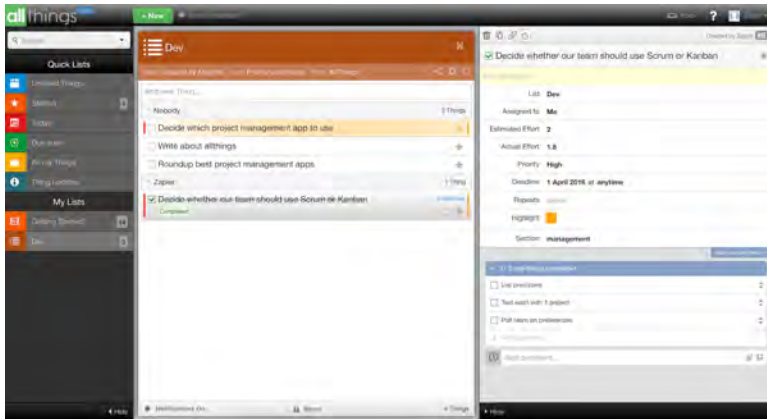
Sometimes it's nice to just quickly list tasks you need to do, and then organize them later. That's what makes Allthings' two task modes so handy. Projects open in a list by default, where you can quickly type in everything you need to accomplish. Track extra details, perhaps your project stage or the team that needs to do it, with extra fields, and select a color and icon for the project from the settings.

Then, click the *View* button on the top right, and choose to sort the tasks in a list grouped by any of your task fields. Or, select *Stack by* and turn any field into kanban-style columns where you can quickly reassign tasks, move them to the next part of a process, or even reschedule them with scrum-style sprints if you stack by week. It's a flexible way to add tasks and organize them later in any way you want.

- **Allthings Price**: Free for 5 lists and unlimited users; $9.95/month per user Team plan for unlimited lists, time tracking, and reports.
- For a deeper look at Allthings's features and pricing plans, check out our Allthings review.
- See Allthings integrations on Zapier.

Gantt Charts

Need to plan projects with a timeline that shows when each task is due and makes sure things don't overlap? Gantt charts are a great tool for that—and each of these tools include powerful Gantt chart views to organize your projects.

App		Best to:	Free for:	Paid plans from:
Wrike	✔	Manage team and personal tasks together in a list, spreadsheet, or Gantt chart view.	5 users	$49/mo. for 5 users
Página	P	Work on personal and team tasks in a professional project management tool.		$50/user
Microsoft Project	P∃	Outline and plan projects with familiar Microsoft Office tools.		$33/mo./user
Sandglaz	S	Plan scrum sprints in kanban-style lists for a simple way to prioritize tasks and plan the week's work.		$5/mo./user
Aha!	!	Turn ideas into broad goals, detailed schedules, and individual releases for effective projects.		$59/mo./user
Runrun.it	R	Know when your projects will actually ship with automatically calculated delivery dates.		$10/mo./user
Projectplace	☁	Manage due dates and processes together in a Gantt chart and kanban mix.	1 project, 5 users	$69/mo. for 10 users, 3 projects

Wrike

Best for: flexible yet simple task lists
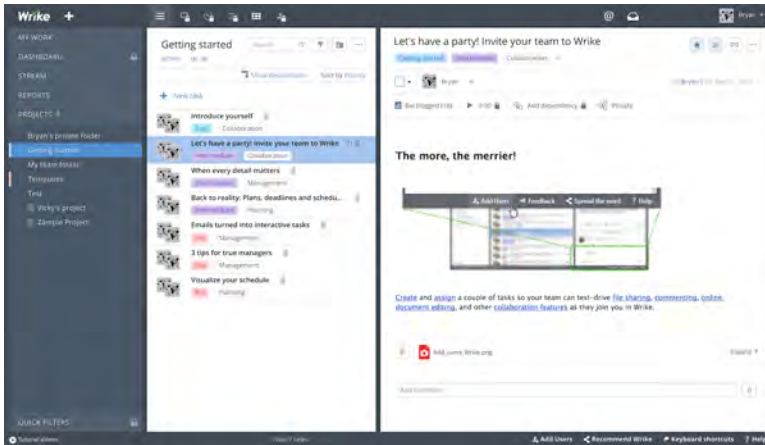
To-do lists are too simple, with just lists of things you need to do and
checkboxes to mark them as done, but at least they let you know
what's due. Spreadsheets are the exact opposite—infinitely flexible,
but tough to know what needs done next. Wrike offers the best of
both worlds, with a spreadsheet view for tasks and custom fields,
along with due dates, comments, and everything else you'd expect
from a project management tool.

You can just add tasks as simple to-dos, and check them off if you'd
like. Or, you can customize tasks with durations, track time, write
rich-text notes, and set them as pending or in-progress instead of
just checking them off. And to keep up with tasks anywhere, you
can export a customized calendar feed with just the data about your
projects that you want.

- **Wrike Pricing**: Free for 5 users and limited features; from
  $49/month Professional plan for 5 users, dashboard views and
  advanced integrations.
- For a deeper look at Wrike's features and pricing plans, check
  out our Wrike review.
- See Wrike integrations on Zapier.

Pagico

Best for: personal and team projects, in native apps
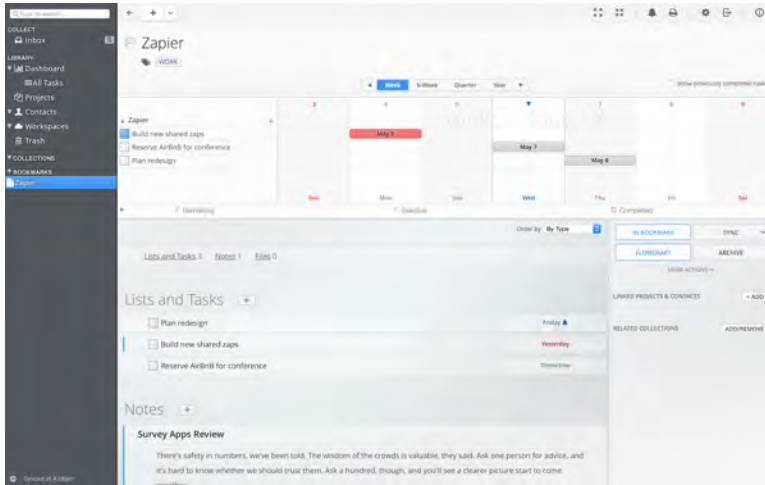
Project management apps are usually built for around teams projects; you'll need another app to keep track of your personal tasks. Pagico merges your individual and team tasks into a single platform that feels more personal. It feels more like your other favorite personal software, with native apps for every platform so you can quick-add tasks from anywhere or drag-and-drop files into projects. And you can make as many projects as you need: some shared with your team, others perhaps shared with freelancers working on your side project, and the rest kept private on your own computer.

It's more than just a to-do list, though. You can add notes and files to projects, view tasks in a list or Gantt chart, and search through everything. You can plan each project better, by seeing every task on the same Gantt chart, where you can make sure nothing overlaps. Or, if you need to focus, just open a workspace, and you'll only see the projects and tasks in that workspace—a great way to keep yourself from worrying about home tasks while at work.

- **Pagico Pricing**: $50/user for Pagico Desktop; from $4.99/month Small Team plan workspace to sync up to 16 devices.
- For a deeper look at Pagico's features and pricing plans, check out our Pagico review.
- See Pagico integrations on Zapier.

Microsoft Project Online

Best for: intranet collaboration with Microsoft Office integration
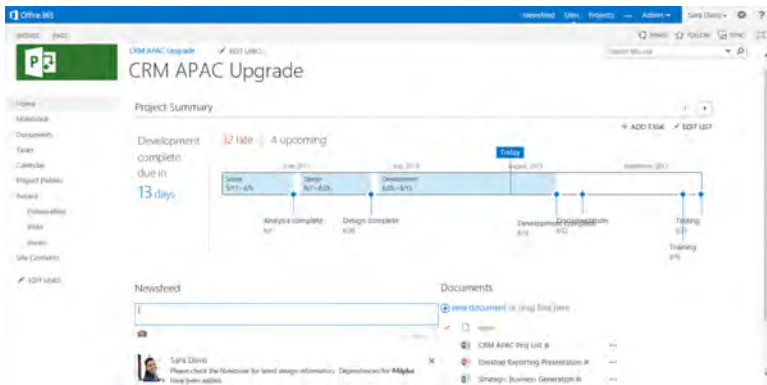
This one's for the Microsoft faithful. If your team collaborates in a Sharepoint workspace, uses Skype for meetings, and creates reports in Excel, Microsoft Project Online fits in the middle of every tool you use.

It's a new online version of the traditional desktop project management software, with tools to organize projects with tasks and milestones, and view them in detailed Gantt charts. And, since it's online, the new Microsoft Project lets you chat or make calls with Skype for Business and share social network-like updates about projects in a project newsfeed.

Microsoft Project Online is built around Office, so you can easily bring in data from other Office tools you use. You can turn Sharepoint task lists into projects, create project workflow designs in

Visio, search through Office 365 and Sharepoint data from projects, and visualize project data using Excel Services. Project Online also integrates with Active Directory, for a simple way to integrate it with your existing device and user management. Or, if you want to manage projects on your own, without a web app, the native version of Microsoft Project is still an effective tool for that.

- **Microsoft Project Online Pricing**: From $33/month per user for Microsoft Project Online with Sharepoint; from $25/month for Microsoft Project with Office 365 for desktop app without web tools.
- See Office 365 for Business integrations on Zapier.

If you want a native app for managing projects individually on your Mac or iPad, OmniPlan is a great similar app with Gantt charts, tasks, and reports in polished native apps.

Sandglaz

Best for: planning scrum sprints in kanban-style lists
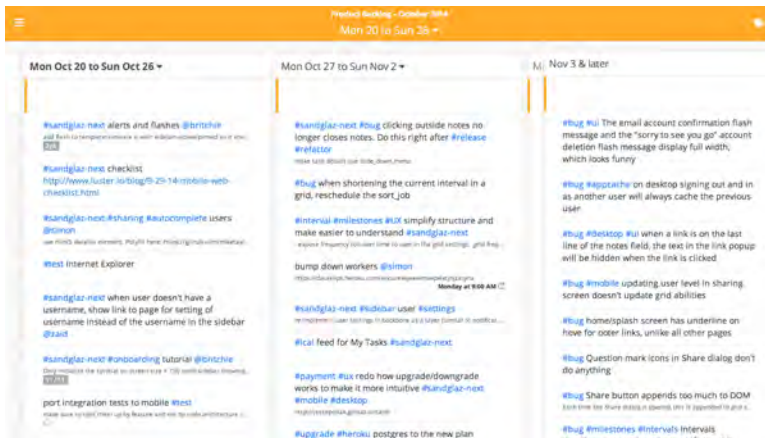
Sandglaz takes a unique approach to scheduling tasks. Their tool mashes up the best aspects of kanban and scrum management styles to make project planning simple. Instead of columns for each stage of a project's workflow, as you'd have in a kanban board, Sandglaz shows a column for each section of your sprint, with new columns for the next sprints automatically added. Each sprint is on1 week long by default, but you can change the default or tweak a single sprint's length if you need.

Then, add your tasks to each sprint, arranging them between the *Important*, *Less Important*, and *Completed* markers to prioritize tasks. If anything doesn't get completed this sprint, just drag it to the next sprint and keep on working. Specific due dates won't be nearly as important, and you can instead focus on the broad timeframe of your project and what really needs to be accomplished this week.

- **Sandglaz Price**: $5/month per user for full features.
- For a deeper look at Sandglaz's features and pricing plans, check out our Sandglaz review.
- See Sandglaz integrations on Zapier.

Aha!

Best for: turning project plans into reality
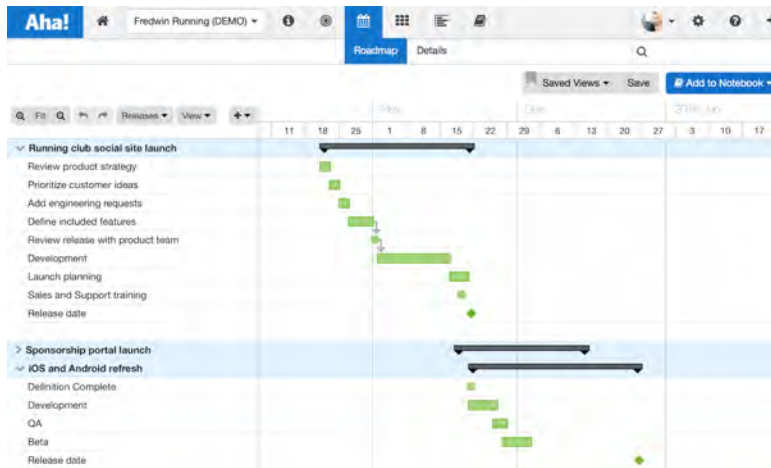
Tasks shouldn't just be random things to do—they should be items
that are purposefully chosen to help your team achieve its goals.
Instead of tossing you into the deep end just starting off with a
blank project, Aha! encourages you to first map out the project's
core ideas. List your broad vision and goals, figure out which ideas
fit your company's strategy best, then research your competition
and see if this project is truly something worth spending your time
on.

That's when the project planning starts. Aha! has you lay out the
broad release schedule, pull in ideas from your team and users
about what to include in that release, and turn those into tasks on
a kanban board where your team can make the project a reality.
And to make sure everyone stays focused on the larger goals, there
are's notebooks and and reports where you can write down ideas,
see how close you are to achieving goals, and decide what project
to start brainstorming next.

- **Aha Price**: Discounted Startup plan for early-stage compa-
  nies with up to 5 users; from $59/month per user Premium
  plan for core features.

- For a deeper look at Aha's features and pricing plans, check out our Aha review.
- See Aha! integrations on Zapier.

Productboard and Prodpad are two other great tools for planning your project roadmaps.

Runrun.it

Best for: deciding what needs done next
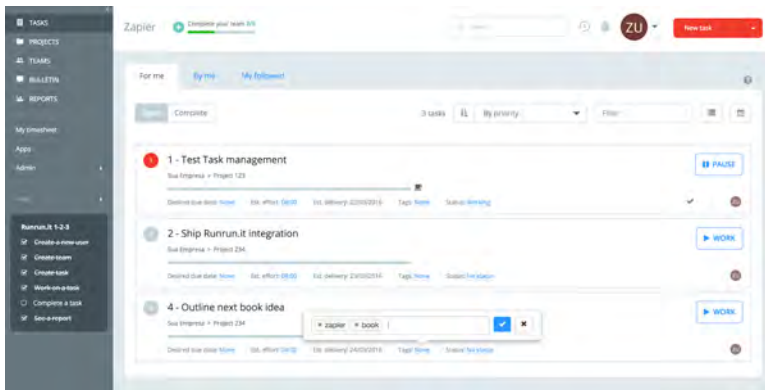
It's easy to assign an arbitrary due date to a task, and assume it will get done then. "But we rarely account for how many hours each task will take—then they pile up, and we go into freak-out mode. That's why Runrun.it doesn't ask for due dates on tasks. Instead, you add start dates to projects, then add your default types of tasks—say, editing, bug fixes, review, and more—along with the time each type of task should take.

Add all of your tasks and projects, and assign them to team members, and Runrun.it will then estimate delivery dates for each task and project based on the types of tasks. You can then see exactly how overloaded each person on the team may be, reassign work

to speed things up, and track time on each task to improve future estimates.

- **Runrun.it Pricing**: From $10/month per user Team plan for core features.
- For a deeper look at Runrun.it's features and pricing plans, check out our Runrun.it review.
- See Runrun.it integrations on Zapier.

Projectplace

Best for: Gantt chart and kanban mixed into a seamless workflow
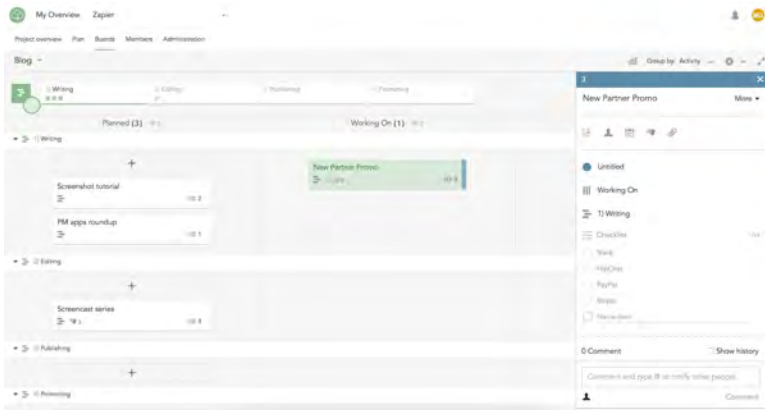
Kanban boards keep you focused on your workflow, while Gantt charts keep due dates front-and-center. Projectplace combines both to help you plan your work, run each step through your workflows, and ship your projects on time.

Start a new project, then add your activities in a list, along with start and end dates. Be sure to list each task's dependencies, to show what needs to be completed first. Then jump over to the board view, and each activity will now have kanban-like columns to add tasks and run them through processes. You can finish tasks in each activity,

then move them on to the next activity for a detailed way to keep
track of your entire project workflow.

- **Projectplace Pricing**: Free for 1 project, 5 users, and 2
  kanban boards; from $69/month Pro plan for 10 users, 3 active
  projects and Gantt views.
- For a deeper look at Projectplace's features and pricing plans,
  check out our Projectplace review.
- See Projectplace integrations on Zapier.

Kanban Boards

When workflows are most important, kanban boards are a handy
way to organize projects. Create a list for each stage of your work-
flow, then add tasks as "cards" onto the lists. Instead of checking
them off when completed, just drag the card to the next list to send
it on to the next stage—say to get a finished article edited, or to have
code reviewed before shipping.

App		Best to:	Free for:	Paid plans from:
Trello		Create easy to use kanban boards with just the features you want.	≈ projects	$8.33/mo./user for pro features
MeisterTask		Brainstorm projects in a mind map, then turn them into kanban projects that automate work.	≈ projects	$9/mo./user for pro features
Blossom		Build clear kanban boards with analytics and email reports to quickly analyze your work.		$19/mo. for 5 users
Kanban Tool		Nest kanban columns to create detailed workflows for your projects.	2 users, 2 boards	$5/mo./user
LeanKit		Custimize kanban boards to fit your team's workflow, and collapse the columns you're not using.	3 users, 2 boards	$12./mo./user
Kanbanery		List estimated effort needed and blockers on tasks for a realistic way to plan your work.	2 users	$22/mo. for 5 users
AgileZen		Organize projects on simple kanban boards, then get notified about updates with instant messages.		$99/mo. for ≈ users and projects
KanbanFlow		Get work done directly on kanban cards with checklists, timers, and more.	≈ users and projects	$5/mo./user
Breeze		Manage tasks and track time in simple, clean kanban boards.		$25/mo. for 5 users
Matterhorn		Plan what your team will work on today and this week—and quickly reschedule tasks.		$9/mo./user
Lavagna		Create flexible kanban boards that run on your own servers.	≈ self-hosted	

Trello

*Best for: easy-to-use kanban boards with only the features you want*
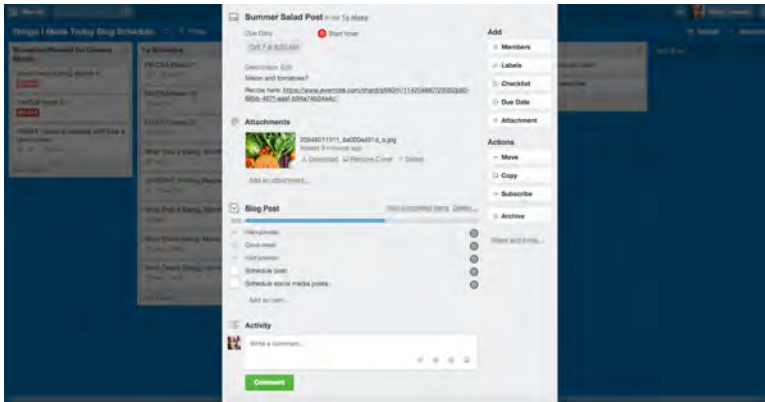
Trello's the app that made kanban boards popular with its bright colors and simple workflows. You start with a blank board, build your own workflow with lists by typing their name and pressing enter, then can add tasks to lists one after another just by pressing enter. Have a list of tasks you've already written? Just paste it as a new task, and Trello will offer to turn each item into its own task.

Trello's designed for collaboration, with comments on each task and centralized notifications. You can make boards for any of your own projects, share them with your collaborators, then join company boards and manage them all together. Then, you can add on the features you need for your work. Trello includes an optional calendar to visualize due dates, fading options to let your older tasks get forgotten, and app integrations to bring in customer data. You can even pick background colors or images for boards, and create colored tags to organize things. It's a project tool that's as simple or complex as you want.

- **Trello Pricing**: Free for unlimited boards; from $8.33/month Business Class plan for premium power-ups, board collections, and personalization.
- For a deeper look at Trello's features and pricing plans, check out our Trello review.
- See Trello integrations on Zapier.

MeisterTask

Best for: turning brainstorming sessions into projects
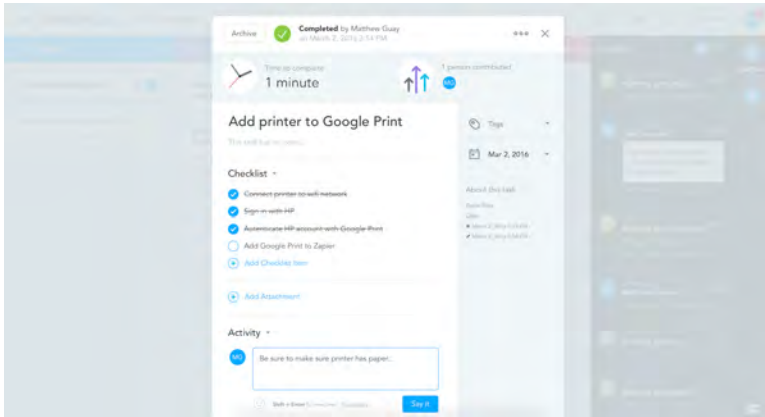
If you've ever used a mindmap to scope out a project, try Meis-
terTask. This app from the MindMeister team lets you transform
mindmaps into projects with a click, so you can start iterating on
ideas right away.

MeisterTask brings a fresh and friendly face to kanban boards, with
a dashboard that shows due tasks from all your boards in one place.
It's built around automations, too, so you can customize it to fit the
way your team works. When you move a card to a new column in
MeisterTask, it can automatically send notifications or copy data to
another app. That way, you can get started on the next part of your
project just by moving a card.

- **MeisterTask Price**: Free for 2 integrations; $9/month per user
  Pro plan for unlimited integrations, workflow automations,
  and reports.
- For a deeper look at MeisterTask's features and pricing plans,
  check out our MeisterTask review.
- See MeisterTask integrations on Zapier.

Blossom

Best for: clear kanban boards with analytics
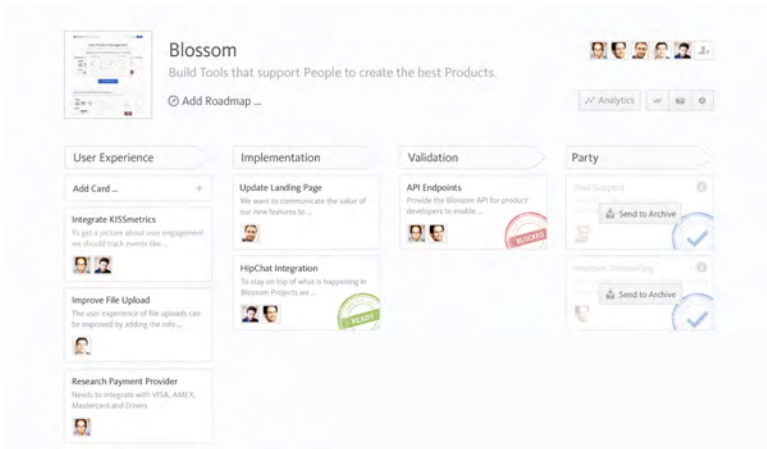
Out of sight, out of mind. The two toughest things to track during a project are your completed tasks, and your blocked tasks. Checked off tasks often just disappear, and blocked tasks look like any other thing that needs done. Blossom balances that out, with rubber stamp-style labels on cards that show when tasks are blocked, ready to be worked on, or completed. It even tracks how long a task sat in limbo, with quick stats when you hover over a card or detailed stats on your project's overall activity.

But you might not have to check the activity page, since Blossom will keep you informed on its own. Daily email digests will show you what's been completed, where you're behind, and what needs done next, for actionable analytics combined with your real tasks to ship projects quicker.

- **Blossom Price**: From $19/month Startup plan for 5 users

Kanban Tool

Best for: nested columns with time tracking

When a single column of tasks isn't enough for one stage of your workflow, KanbanTool's flexible boards come in handy. Each Kanban list can have multiple columns, or you could nest another list inside larger lists for even more detailed workflows. There's also swimlanes that divide lists into sections, to manage multiple projects on the same board.

Each card on your KanbanTool boards includes smart time tracking that watches how long the card was in each list of your workflow, along with the total amount of time the task took to complete. You can then easily see which parts of your workflows cause the most bottlenecks, so you can improve your workflows and figure out where to focus time and resources to complete projects faster next time.

- **Kanban Tool Price**: Free for 2 users and 2 boards; from $5/month per user Team plan for unlimited boards.
- For a deeper look at Kanban Tool's features and pricing plans, check out our Kanban Tool review.

- See Kanban Tool integrations on Zapier.

LeanKit

Best for: customizable kanban workflows
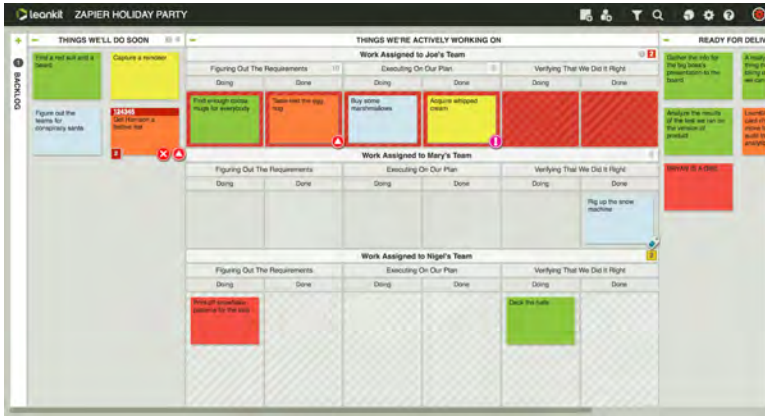
Not every stage of your workflows will fit into the same kanban
lists. LeanKit's customizable kanban boards let you make flexible
boards that fit your projects perfectly. You can divide lists into
sections, perhaps for workflows where some tasks in the same
project need to go through a different process, or just to organize
tasks for each team. Each list can include a Work in Progress limit,
to keep everyone from getting overwhelmed with tasks. And if you
need to focus, just hide a list and focus on the columns with your
current tasks.

LeanKit gives you an at-a-glance overview of what each task
entails, as each card is a small thumbnail of everything in the
card. Cards can track sub-tasks, connected tasks, comments, and
anything else you need to track about tasks—each of which show
up as icons on the card thumbnail. Then, as you finish your projects,
the reports in LeanKit will show which parts of your workflow
caused bottlenecks to help improve next time.

- **LeanKit Price**: Free for 3 users and 2 kanban boards; from $12/month per user Standard plan for unlimited boards.
- For a deeper look at LeanKit's features and pricing plans, check out our LeanKit review.
- See LeanKit integrations on Zapier.

## Kanbanery

Best for: organizing kanban boards into workspaces
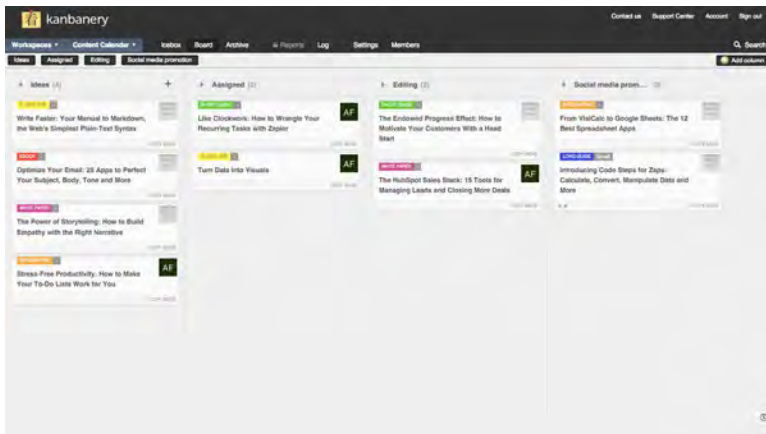
Kanbanery makes it simple to organize projects on kanban boards, with its pre-made board templates for a handful of example workflows. Each includes columns, task types, and task time estimates that you can then tweak for your own projects.

Each list can be quickly tweaked with capacity limits to ensure no stage of the workflow is overbooked. Perhaps you can only edit three blog posts at once; add a capacity of 3 to your *Editing* column, and you'll have to clear out some editing work before you can add any more tasks. Or, if you have never-ending lists—perhaps your *Ideas* or *Backlog* column—just collapse them to hide the clutter, and stay focused on your current workflow stage.

- **Kanbanery Price**: Free for 2 users; from $22/month Freelancer plan for up to 5 users.
- For a deeper look at Kanbanery's features and pricing plans, check out our Kanbanery review.
- See Kanbanery integrations on Zapier.

AgileZen

Best for: getting notified about project updates in IM
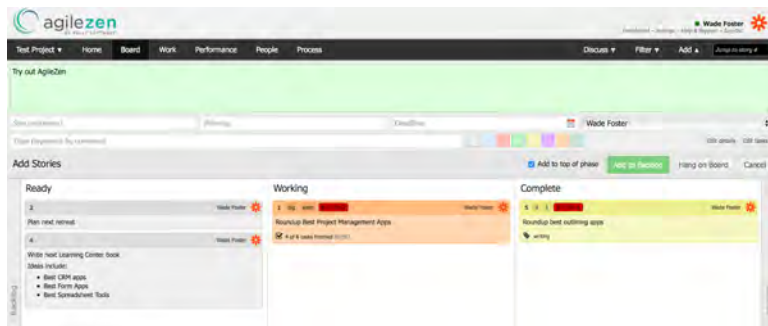
If your team uses Google Talk to communicate—or if you would like to get simple notifications about tasks right inside iMessage or Gmail—AgileZen's clean kanban boards may be what your projects need. You can list each task's priority and estimated size, then organize tasks on a customizable board that includes archive and backlog columns that are hidden by default.

Then, as your tasks are moved to the next columns or your team chimes in with comments, you'll get the notifications directly in your favorite chat or email app. You can check out your team's performance from AgileZen's graphs, which show how long cards sat in each stage of the process, how long they were blocked, and how efficiently your team works.

- **AgileZen Price**: $99/month Unlimited plan for unlimited projects and users.

- For a deeper look at AgileZen's features and pricing plans, check out our AgileZen review.
- See AgileZen integrations on Zapier

KanbanFlow

Best for: Getting work done directly on kanban cards
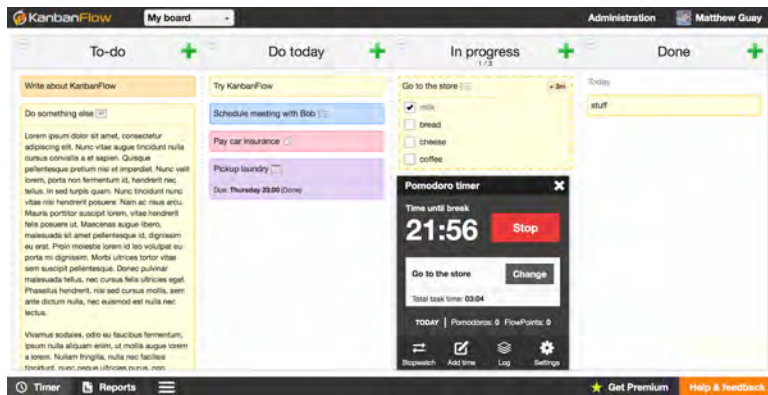
Kanban boards show an overview of projects at a glance, but you typically have to open a card to see its subtasks and other info. KanbanFlow helps you work faster, with sub-tasks, notes, and due dates right on the card's preview, along with color-coded cards to visually classify tasks. You can check off tasks or visit links from comments without opening the card, to help you stay focused and work faster.

KanbanFlow also includes a timer, which both tracks the time you spend working and uses the pomodoro method with reminders to take breaks every 25 minutes to maintain your productivity. With those features to keep your team productive, you'll get your projects accomplished even faster.

- **KanbanFlow Price**: Free for unlimited users and boards;

$5/month per user Premium plan for swimlines, calendar view, reports and export.

- For a deeper look at KanbanFlow's features and pricing plans, check out our KanbanFlow review.
- See KanbanFlow integrations on Zapier.

Breeze

Best for: clean kanban boards that track time
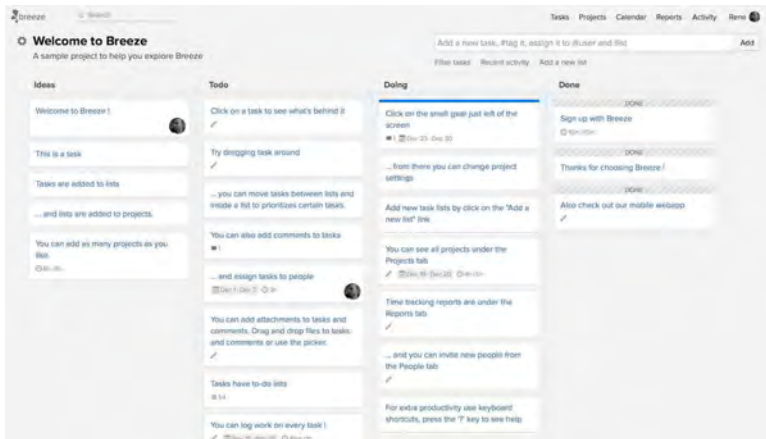
Each task represents more than just a task—it's a tiny project of its own. Breeze tracks these details directly on each task's card. You can list sub-tasks on cards, and check them off without even opening the task. Track time on the tasks, log work completed, then move the task to the next column for its next step in your workflow.

You can let clients in, too, with a special client mode so they can see the tasks and logged work but not the comments and private tasks you may also be working on. If you want, though, you can let clients move cards between lists, perhaps to change task priority or add their own new ideas about a project—something that might

fit well with projects where clients need direct input on what gets
done first.

- **Breeze Price**: $14/month for 1 user; from $25/month Free-
  lancer plan for up to 5 users.
- Breeze Zapier integration coming soon.

Matterhorn

Best for: planning daily and weekly schedules
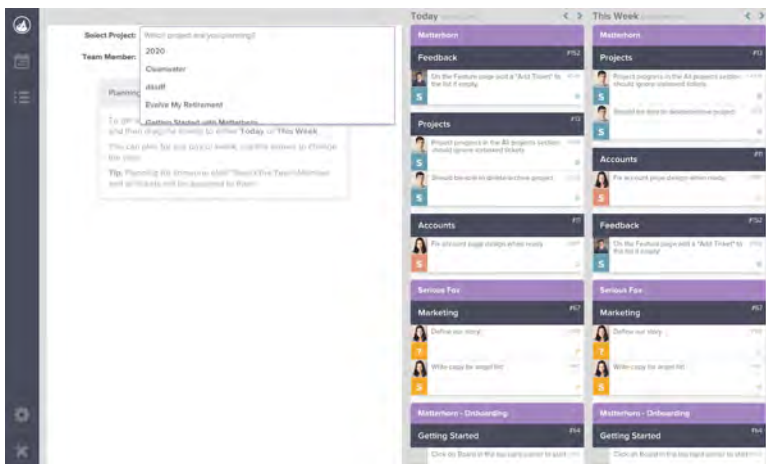
Planning your work schedule across multiple projects can be a
daunting task. That's where Matterhorn's Planner mode comes
in handy. View assigned tasks for today and this week across all
projects, or see just what's assigned to one team member, and
reassign or reschedule as needed. You'll get a quick glance at the
agenda for this and next week—and changing things around only
takes a click.

Matterhorn will then keeps your projects organized, with customiz-
able kanban-style boards that group tasks into sections to group

tasks. Pull on-hold ideas into the icebox list, group similar tasks
together, and drag them on towards completion as your projects
get close to completion. You'll be able to see the progress in graphs
on your dashboard, and in a daily email where Matterhorn will
automatically update everyone on your team's productivity.

- **Matterhorn Pricing**: $9/month per user.

Lavagna

Best for: kanban boards on your own servers
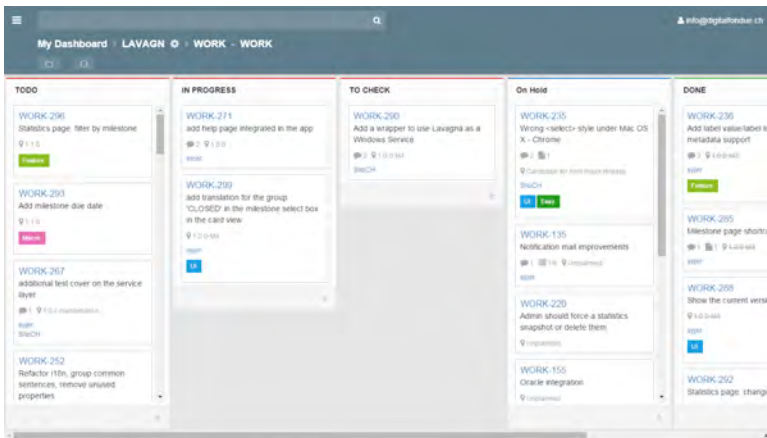
At first glance, Lavagna seems like your standard Kanban app. But
here, your labels have superpowers. Labels in Lavagna can link to
other cards or users, have lists for priority and other options, or just
be a standard colored label. Then, organize your cards on flexible
lists, using labels to create the automated workflows that fit your
team's needs.

Managing users is surprisingly simple for a self-hosted app app you
run on your own servers. Users can login with any OAuth provider,
then you can manage exactly what each user can see and change

in your boards. There's a dashboard to see all projects at a glance, reports to see average cards per user and other stats, and milestones for a way to set broader deadlines in addition to individual task due dates.

- **Lavagna Pricing**: Free open-source.

Scrum Sprints

When both workflows and deadlines are important, Scrum sprints fit right between Gantt charts' calendar views and kanban boards' workflows. Instead of assigning a due date to each task, pull tasks into sprints, or time periods when a specific set of work should be done. Finish those tasks, then move onto the next sprint to polish or add more features.

App		Best to:	Free for:	Paid plans from:
Pivotal Tracker		View the most important parts of all projects in one customizable dashboard with everything in lists.	3 users, 2 projects, ∞ public projects	$15/mo. for 5 users and 5 projects
JIRA		Speed up software projects with customizable scrum workflows and plugins for extra features.		$10/mo. for 10 users
Targa		Custome a scrum and agile project management workflow on your own servers.	1 project; ∞ self-hosted	$19/mo. for 5 projects
Targetprocess		Visualize projects in kanban, scrum, timelines, portfolios and more for a better overview of each project.	1000 entries	$10/mo./user
LiquidPlanner		Organize tasks in detailed hierarchy and get best and worst case completion estimates to plan effectively.		$29/mo./user
Axosoft		Plan releases with scrum sprints, then organize indivdual task workflows with kanban in the same app.		$10/mo. for ∞ users and 100 active tasks

Pivotal Tracker

Best for: Seeing important parts of all projects at once
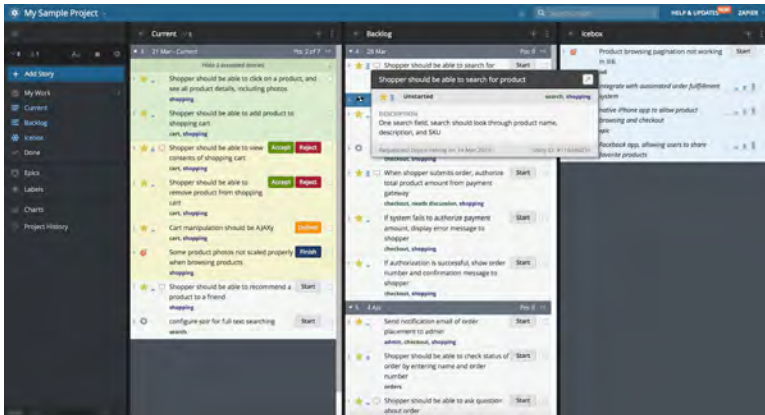
Pivotal Tracker looks much like a typical kanban board, but its flexible scrum workflows and dashboards make it a tool to simplify your most complex projects and work on them all together.

It starts with scrum stories, organized in lists with iterations to break the project up into sprints. Add notes, tasks, and assignments, then use workflows to accept, start work, finish, and deliver completed stories and ship them in your next product release. And for even more structure, there's an Icebox of tasks you *may* get to someday, and Epics to lay out your broader project plans.

With all those details, each project can quickly get overwhelmingly complicated—something Pivotal Tracker's interface is designed for. You can add or remove columns from the interface as you want, to perhaps only show your work or to see everything at once—complete with charts on the project in just another column. You can even make new dashboards that pull all of your projects into other columns, to see the most important parts of each project together.

- **Pivotal Tracker Price**: Free for 3 users and 2 private projects; from $15/month Startup plan for 5 users and 5 private projects.
- For a deeper look at Pivotal Tracker's features and pricing plans, check out our Pivotal Tracker review.
- See Pivotal Tracker integrations on Zapier.

JIRA

Best for: turning tasks into new releases
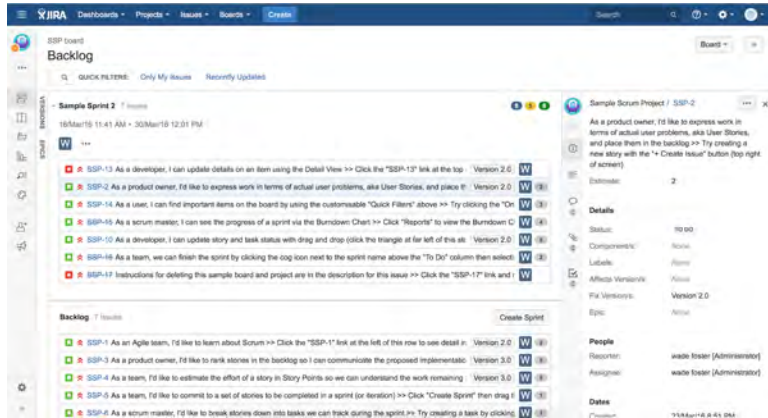
Some tasks just need to be checked off. Others need to be taken through an approval or editorial process, then shipped as part of a new release. JIRA is designed around software development projects, and is deeply integrated with Bitbucket code repositories, Confluence documentation, Bamboo tests, and HipChat chats. But JIRA's customizable workflows, scrum lists, kanban boards, and hundreds of add-ons for extra features make it a handy tool for any type of projects.

Set up your own workflow, with settings for each status stage and custom fields on tasks to store anything you need. Then, make your scrum sprints or kanban lists, add tasks to the right part, and start shipping your next projects with a full log of the tasks that went into that release.

- **JIRA Price**: $10/month Small team plan for 10 users; from $75/month Growing teams plan for up to 15 users.
- For a deeper look at JIRA's features and pricing plans, check out our JIRA review.
- See JIRA integrations on Zapier.

Taiga

*Best for: customizable scrum and agile projects*
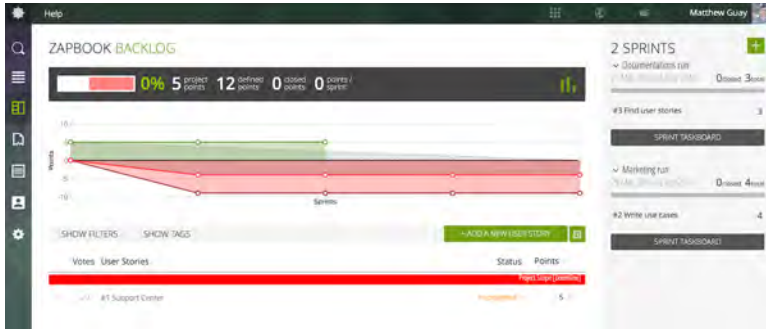
Sometimes it's not the due dates on individual tasks that really matter. It's this work week or project timeframe—and what you can accomplish during it—that really really matters, and decides what will get shipped. Taiga is an agile project management tool that simplifies planning those sprints. Just create a new Scrum project, add user stories with things you wish to accomplish and the points (an estimate of the effort they'll require) that item would require from each team. Then, add sprints with a timespan for each one, drag in the stories you want to complete, and then add tasks to each story to start checking off.

Your story tasks will show up in a scrum-style list by default, or you can enable a kanban board view instead for more routine projects and tasks. Everything is customizable—you can add wiki and call tools, and even run Taiga on your own servers and tweak its code if you want. It's a great way to build custom workflows for agile projects.

- **Taiga Pricing**: Free for unlimited public projects and 1 private project; free unlimited self-hosted; from $19/month for up to 5 private projects.

Targetprocess

Best for: customized boards to view projects the way you want
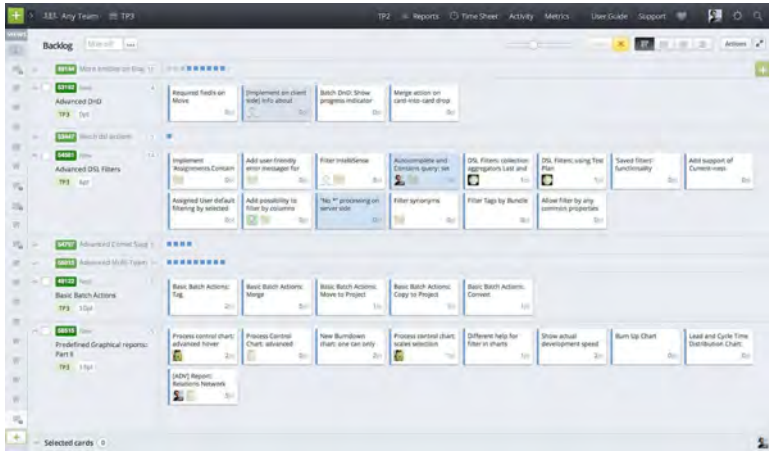
Boards are a great way to organize tasks, but traditional vertical kanban lists might not be best for every project. Targetprocess lets you organize boards the way you want, with story map, product roadmap, sprint plans, traditional kanban, and other detailed layouts for your projects. They each have their advantages: some let you break parts of projects down into smaller steps, others help you organize a portfolio of projects, and even the traditional kanban board lets you collapse lists and still get a quick overview of what's inside. And each board is just a layout to visualize your tasks: you can tweak anything, or even delete a board, and the cards will stay the same, ready to be viewed in another board with just a click on the left sidebar.

It's designed for large, complex projects, with tools to help you make sense of them all. Reports help you find how teams perform and other smaller details from the big picture, while customized dashboards let you combine those reports with tasks to better manage your workflow. You'll have the big picture and the takeaways it can

offer, along with the task you need to do next.

- **Targetprocess Price**: Free for 1,000 entries; $20/month per
  user Company plan.
- For a deeper look at Targetprocess's features and pricing
  plans, check out our Targetprocess review.
- See Targetprocess integrations on Zapier.

LiquidPlanner

*Best for: getting best and worst case estimates for a project's
completion*
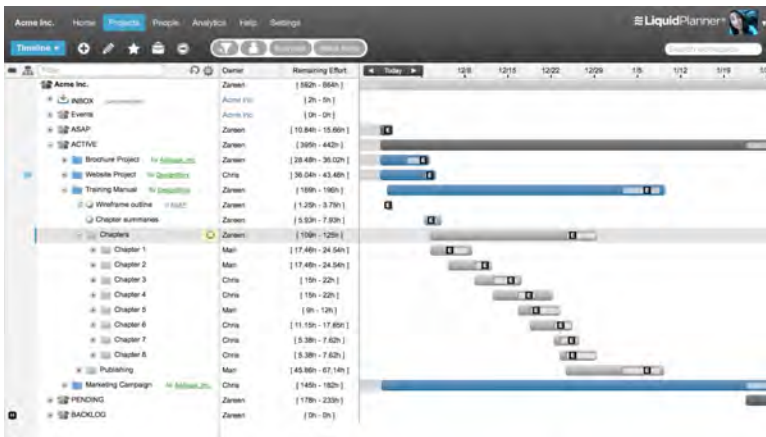
Folders work well for organizing files on your computer, and in
LiquidPlanner, they can work equally well to organize everything
you need to accomplish in tidy groups—and can even be a way to
see how long all your tasks will take. Add as many folders and sub-
folders as you need to organize everything in a project, then add
the estimated time each task will need.

The folders will then pull that estimated time together, so you can
collapse a folder and see an estimate of how much time that entire

set of tasks will take to complete. LiquidPlanner will then estimate best and worst case scenarios, for an even clearer picture of when the project will likely be finished.

It's a simple way to organize your tasks, and also a great way to build your own waterfall or scrum workflows. You could make folders for each part of your workflow process or scrum sprint, then use the estimated time LiquidPlanner adds to folders to make sure you can finish the work in the set timeframe.

- **LiquidPlanner Price**: From $29/month per user Standard plan for 50 projects and 25 clients.
- For a deeper look at LiquidPlanner's features and pricing plans, check out our LiquidPlanner review.
- See LiquidPlanner integrations on Zapier.

Axosoft

Best for: a seamless scrum and kanban workflow

Scrum releases are a great way to plan your project's broad deadlines and goals, while kanban boards help create a workflow for your tasks. Axosoft gives you the best of both worlds. You can plan projects in a spreadsheet-style scrum list, using charts to figure out how much work can fit into each time period.

Then, when it's time to work on the tasks, Axosoft's kanban board gives you columns for every step of your workflow. Move cards around and work on them together, and the changes will reflect back in your manager's scrum view. And when you need to brainstorm and work on project details together, the built-in wiki is a handy way to document anything and even share details in public if you want.

- **Axosoft Price**: From $10/month Starter plan for unlimited users and up to 100 active tasks.
- For a deeper look at Axosoft's features and pricing plans, check out our Axosoft review.
- See Axosoft integrations on Zapier.

The Best Project Management Apps for Chat and Messaging

There are things to be done, milestones to meet, and deadlines to beat. And yet, sometimes a comment is not enough to figure out how to proceed with a project. You need time to chat with your team, work out a solution, and *then* check off that next big goal.

You could always use a team chat app, or you could use a project management app that brings chat into your projects. These tools include tools for managing tasks, deadline, and workflows like the previous apps, then also add team chat, documents, and other messaging tools to keep everything about your project in one place.

App		Best to:	Free for:	Paid plans from:
Basecamp		Only focus on work, at work, with notifications that only come in during work hours.	1 project	$29/mo.
Redbooth		Collaborate on projects with live chat, voice, and video calls alongside kanban projects.		$5/mo./user
Flow		Combine team chat, projects, and personal tasks in one simple interface.		$19/mo. for 3 users
Azendoo		Keep up with everything in projects with a built-in social network, progress charts, and live chat.		$7.50/mo./user

Basecamp

Best for: unintrusive team productivity

One of the original online project management apps, Basecamp has always taken a simpler approach to projects. It's designed to keep everything about your projects—discussions, tasks, emails, and files—in one place.

The original version of Basecamp did this with a typical tabbed layout; the next version then borrowed a page from its sidekick app Backpack and put everything for the project literally on the same page. Basecamp 3 builds on that, adding Campfire team chat into the mix with a modern take on a tabbed interface that shows quick previews of each section along the top. You can chat about your project, right from that project's page, and see everything everyone's said.

The problem with so much in one place is that projects can become noisy, shouting for your attention at all hours. But not Basecamp. With its *Work Can Wait* feature, you can set your available days and hours, and Basecamp will only notify you of new messages, tasks, and other notifications when you're actually working. You won't get left out, either: there are quick reports to see what's happened,

a list of notifications to quickly catch up, and check-ins for a quick
way to see what your team's up to.

- **Basecamp Pricing**: Free for 1 project; from $29/month for
  internal teams, with unlimited projects and features.
- For a deeper look at Basecamp's features and pricing plans,
  check out our Basecamp review, or check our reviews of
  Basecamp 2 and Basecamp Classic for a look back at older
  versions of Basecamp.
- See Basecamp integrations on Zapier.

Redbooth

Best for: live chat, voice and video calls in projects
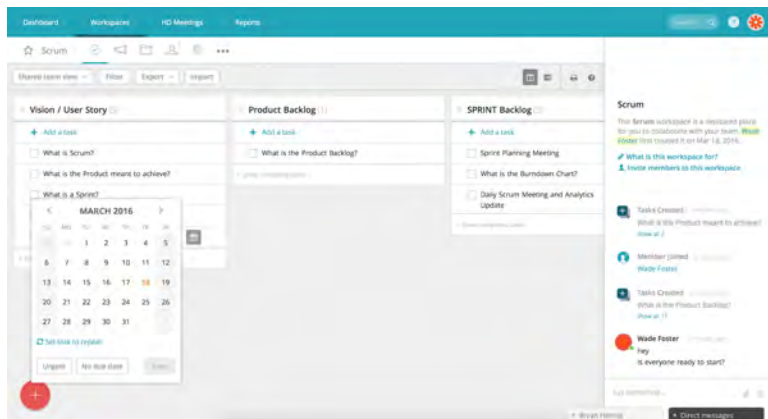
Chat and messages might not even be enough for your team's
communications needs. Redbooth throws in voice and video calls—
complete with screen sharing—so your team can collaborate right
from your projects. Each project workspace gets its own team chat,
to discuss that project, and there's a familiar chat box on the bottom
of the screen where you can chat with any team member. Then,

when you need to talk things through, a real call is only a click
away.

Redbooth lets you manage your projects the way you want, with
kanban boards or lists to organize tasks and time tracking to see
where your day goes. Or, if you're not sure where to start, there's a
library of project templates to start your projects out in a click.

Redbooth Price: From $5/month per user Pro plan for unlimited
projects and 20 hr/month video calls. - For a deeper look at Red-
booth's features and pricing plans, check out our Redbooth review.
- See Redbooth integrations on Zapier.

Flow

Best for: creating tasks directly from chat
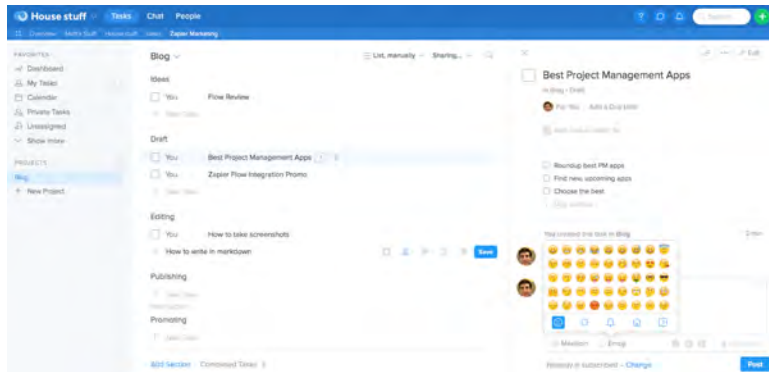
Flow at first glance looks a bit more like a to-do list app, with simple
lists of tasks. But once you break those task lists up into sections,
add due dates and sub-tasks, then view them in a kanban board,
you have a place where you can manage any project workflow.
You'll work in workspaces, with as many project lists as you need
to organize everything in progress.

Then, when you need help, Flow's Chat tab lets you talk to your

team in public or private group chats, or with direct messages to individuals on your team. And if you talk about anything that should get turned into a task, press *Tab* in the chat box, type in your task and press Enter, and it'll be added to your to-do list and saved in the chat automatically.

- **Flow Pricing**: From $19/month Starter plan for 3 users.
- Connect Flow to Zapier using the Zapier Email integration.

Azendoo

Best for: social networking around projects
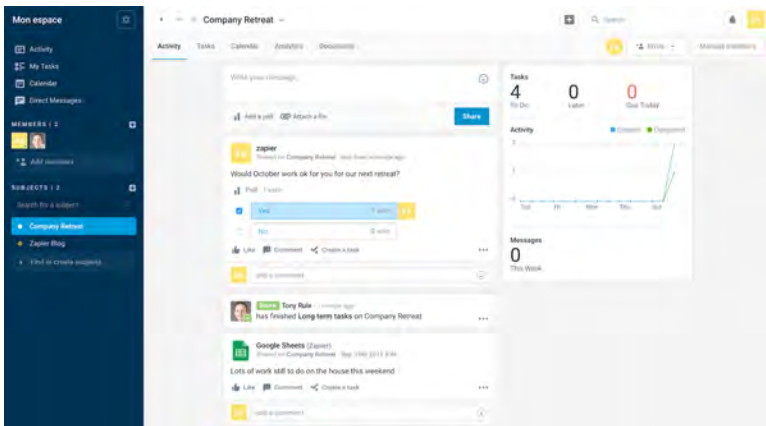
Live chat with your full team can get confusing, with in-depth conversations interspersed with random chit-chat. Azendoo keeps things focused, with Facebook-style group posts that live on each project's (or *Subject*, in Azendoo) space. You can post about your progress, share a file or photo, or start a quick Yes/No poll, then join in the conversation via comments. And if you need to talk in real-time about something, there's still direct messages for live chat with individual colleagues.

Tasks in Azendoo are organized more like a to-do list, with section headers to organize task groups or make your own workflow. Import documents from Google Drive, Dropbox, or Evernote to keep up with notes and info about the project—or even pull in Evernote notes with to-dos to quickly add tasks—and see your team's productivity with analytics in a dedicated tab or on your dashboard. It's a simpler way to stay productive with less distraction from always-on chat.

- **Azendoo Price**: From $7.50/month per user Team plan for core features.
- For a deeper look at Azendoo's features and pricing plans, check out our Azendoo review.
- See Azendoo integrations on Zapier.

The Best Project Management Apps for Clients

When you're working on your own company's projects, the important part is shipping the new thing and moving on to the next

project. With client work, though, you'll need to handle invoicing, follow-up requests, sporadic feedback, and future-facing projects.

Client-focused project management tools are designed to help you handle all of this. They include the same productivity tools other project management apps offer, along with tools to track the time you spend on tasks and turn it into invoices. You can focus on getting work done for your client, while your project management tool makes sure you don't forget anything *and* ensures you'll get paid for your time.

App		Best to:	Free for:	Paid plans from:
Avaza		Quickly turn quotes into tasks, expenses, time sheets, and finished projects.	1 user, 5 projects	$9.95/mo. for 1 user
Paymo		Manage multiple client projects together easily, and switch betwen them in seconds.		$4.95/mo./user
Pancake		Focus on client projects in a self-hosted project tool.		$149 one-time fee self-hosted
Thrive		Get client work done quickly with a beautiful typography-focused project management app.		$9/mo./user
Trigger		Turn client emails into to-dos, then plan all of their projects and share details with them automatically.		$8/mo./user
Mavenlink		Make sure you complete client projects on time with critical path planning and Gantt charts.	Core task features	$19/mo. for 5 users
Easy Projects		Inform clients with a dedicated dashboard—and get important tasks completed with dependencies.		$15.75/mo./user
Teamwork Projects		Stay on track for shipping the next big thing with milestone-focused projects.	2 projects	$12/mo. for 5 projects
Magnetic		Track everything about client projects and manage them along with accounting and CRM in one app.		$25/mo./user
Project Bubble		Start client projects quickly with templates and task dependencies to reschedule tasks together.		$19/mo. for 10 projects
Zoho Projects		Manage client projects of every shape and style inside one app.	1 project	$25/mo. for 10 projects
Active Collab		Visualize client projects the way that works best, then track time and invoice from one app.		$25/mo. for 5 users
Freedcamp		Manage projects for free then pay for CRM, issue tracking, and other add-ons as needed.	∞ users and projects	$2.49/mo. for extra storage and features

Avaza

Best for: quickly turning quotes into finished projects
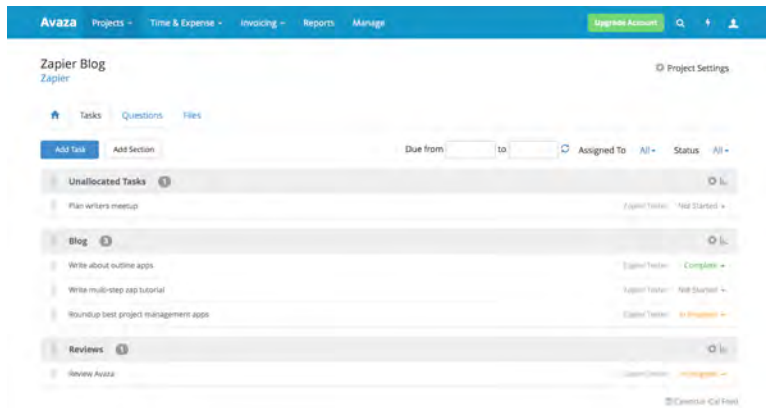
Looking for a simpler tool for client projects? Avaza lets you start out by sending a quote to your clients for a potential job. Once they approve it, plan out your project with to-do lists in sections for each goal or stage of the projects. Every section can have its own start and due dates, for a quick way to plan work without having to set due dates on individual tasks, and Avaza will then show a burndown chart that shows the time you'll need to complete each task versus the project's due date.

Client work often means expenses, which you can capture in Avaza by snapping a photo of your receipts. Once everything's done, you can turn your time sheets and expenses into invoices, and get paid via credit card directly from Avaza, without using a 3rd party payment system. It's a simple way to manage everything about your client projects and get paid for your work.

- **Avaza Price**: Free for 5 projects, 10 customers, and 1 user; from $9.95/month Startup plan for 1 user, unlimited customers, and 20 active projects.
- For a deeper look at Avaza's features and pricing plans, check out our Avaza review.
- See Avaza integrations on Zapier.

Paymo

Best for: managing multiple client projects together
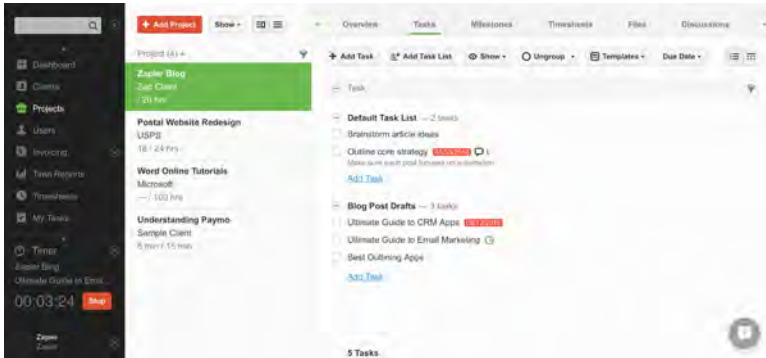
Need a quick way to peek into multiple projects without hassle? Paymo is designed around switching between projects, with a three column interface that's similar to an email or notes app. There's tool on the left, a list of projects in the middle, and your current project on the right—with its own dashboard, tasks, and more. Just select another project to see its tasks or notes, then jump back to your original project in just a click.

Paymo's project organization is simple by default, with plain text to-dos for each task. Quickly list everything that needs done, then organize them into separate lists and start the timer from the clock icon on any task to start logging your work. Then, when you need to switch focus, just switch to another project and click the clock on a task there to log work on that project.

- **Paymo Price:** $4.95/month per user for core features; add-ons for invoices and Gantt charts for additional fee.
- For a deeper look at Paymo's features and pricing plans, check out our Paymo review.
- See Paymo integrations on Zapier.

Pancake

Best for: self-hosted client-focused productivity
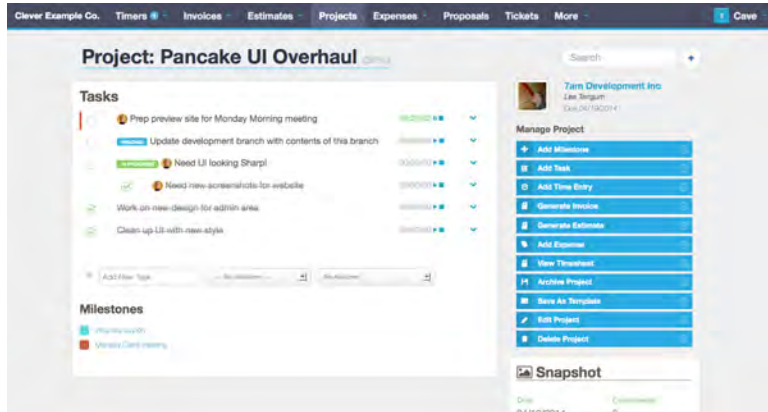
Working with dozens of clients at once can be confusing at best, and hard on your budget if your project management tool charges per project or client. If you already have your own server or hosting account for your website, Pancake only charges a one-time fee—then you can use it forever with as many clients as you need.

Pancake manages your client tasks and milestones, then tracks the time and expenses you spend on them. You can share your work-in-progress with clients from Pancake, so they can see how things are going. Then, when the project is finished, you can send invoices they can pay online via PayPal or Stripe right from your self-hosted project tool.

- **Pancake Pricing**: From $149 per Pancake 4 license for unlimited projects on one server, and basic support.

Thrive

Best for: beautifully designed projects
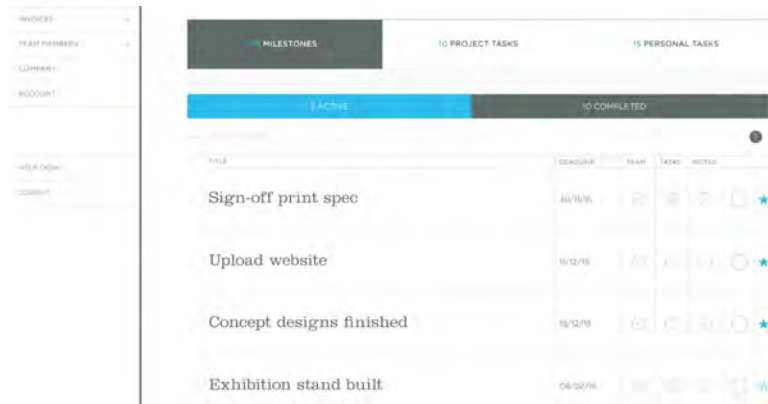
It started out as Solo, an artsy project management and invoicing tool for freelancers. Now, with Thrive Teams, you get the same beautiful interface for your team projects, along with comments, team reports, and other collaborative features. Thrive is filled with charts and dashboards that make sense of your project data, helping you see what's left to do and how much you've accomplished at a glance.

There are milestones and tasks to organize your client projects, time tracking and expenses to log everything that goes into those projects, and beautiful reports and invoices to have something to show for your work. Then, when you go to take on new projects from clients, Thrive will show stats on them to see if you'll likely get paid—or if you should focus on another project first.

- **Thrive Pricing**: $15/month Solo plan with unlimited features for 1 user; from $9/month per user Teams Startup plan for up to 5 projects and 3 users.

Trigger

Best for: creating tasks from client emails
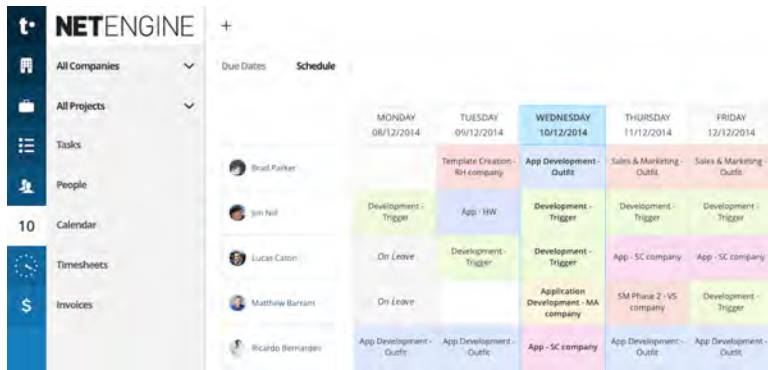
Feel like you're always copying info from client emails to create new tasks on their projects? Trigger simplifies things, with an email address for each project. Just forward your client emails to their Trigger project, and the message will be turned into a task without needing to copy anything.

Then, once it's time to start work on the project, just add milestones and set a project budget, and organize all the tasks into an achievable workflow. If anything won't fit in your budget, it's easy to cut it out then before you start work. Your clients can then see all of their projects you're currently working on, so you'll never have to remember to email them about how the project's going again.

- **Trigger Price**: $8/month per user for full features.
- For a deeper look at Trigger's features and pricing plans, check out our Trigger review.
- See Trigger integrations on Zapier.

Mavenlink

Best for: scheduling client projects
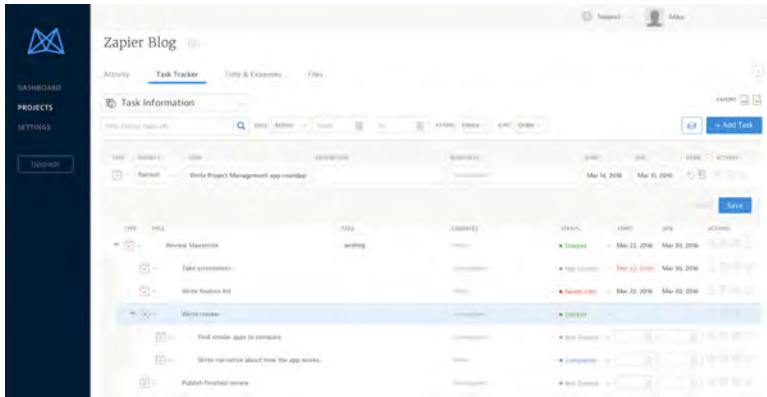
Ever wondered how changes to a project's deadlines affected it? Mavenlink's Gantt chart snapshots gives you a way to actually find out. When you first set up projects, Mavenlink has you choose a baseline for the project—the timeframe you think it'll be completed within. Add tasks with dependencies, then you can see which tasks are blocking each other, and drag them to a new date to reschedule and make way for more important tasks. Then, you can take a snapshot, and if you make any changes in the future, you can compare the original baseline against the snapshot and final versions of your project deadlines.

Extended deadlines often mean additional costs, something Mavenlink also helps you guard against with project budgets. You can set a time and price budget for projects, and also set how much time each team member has, then make sure projects don't go over budget or overwork your team. It'll help you stay focused on improving your processes, so projects can get shipped on time and within budget more often.

- **Mavenlink Price**: Free for core task features; from $19/month Teams plan for core project management features for 5 users.
- For a deeper look at Mavenlink's features and pricing plans, check out our Mavenlink review.
- See Mavenlink integrations on Zapier.

Easy Projects

Best for: simple client feedback on your work

Easy Projects makes it easy to keep your clients informed. Each of
your client projects includes a special guest portal, with a Twitter-
like timeline of every change you've made to each of their projects.
Clients can preview and approve work or chime in with add their
own comments, and can add their own issues or requests to steer
the project in the direction they want.

Keeping your own projects on track will be simple, too, with Easy
Projects' Gantt chart and critical path tools. Each task can include
multiple dependencies—perhaps to list a task as something you can
only do once a previous task is completed, and then tag another task
that can be started once this task is finished. That'll help you get a
better picture of which tasks need tackled first—and how busy your
workload will be over the coming weeks.

- **Easy Projects Price**: From $15.75/month per user Pro plan
  for core features and 60 portfolios.
- For a deeper look at Easy Projects's features and pricing
  plans, check out our Easy Projects review.
- See Easy Projects integrations on Zapier.

Teamwork Projects

Best for: completing projects in a specific timeframe
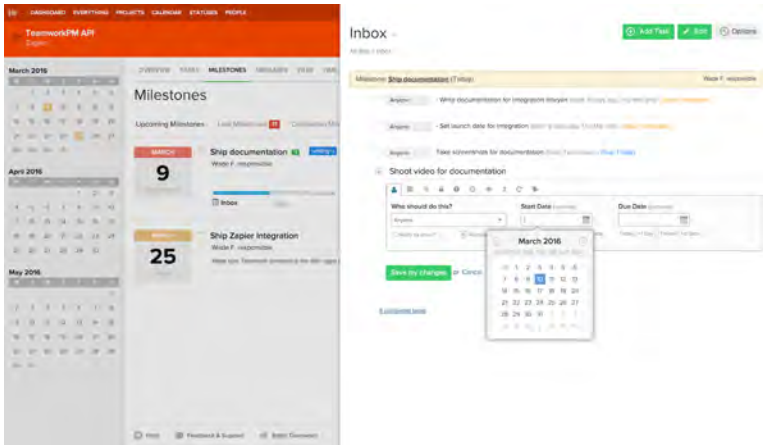
Projects shouldn't drag on forever. Teamwork Projects makes sure you ship within the set timeframe with a strong emphasis on dates and milestones. New projects get a start and due date—something you can also add to tasks—while milestones and their related tasks are kept front-and-center throughout the app.

Adding tasks is simple—paste in a plain-text list, and Teamwork will turn each line into to-dos that you can tie to a milestone in a click. Then visualize tasks in a Gantt chart, add dependencies, share notes and links or update your team with built-in status messages, and sync files from your team's file storage tool. Tie it in with Teamwork's chat and desk tools for team chat and customer support, respectively, and you can push your projects towards completion while taking care of everything else in your company all from one place.

- **Teamwork Projects Pricing**: Free for 2 projects and basic features; from $12/month Personal plan for 5 projects, 1GB storage, and unlimited users.

- For a deeper look at Teamwork Projects's features and pricing plans, check out our Teamwork Projects review.
- See Teamwork Projects integrations on Zapier.

Magnetic

Best for: tracking everything about client projects
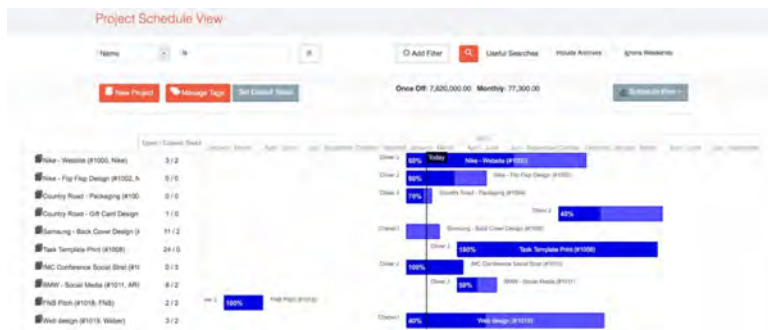
You need to track more than just tasks for your client projects, so Magnetic is designed to handle everything. It can manage client projects along with CRM and accounting data, for a full picture of everything your team is working on. Start out with estimates for client work, turn those into projects, then track your time and expense costs from suppliers and more.

Magnetic's project tools will help you keep from overextending yourself, too. View each team member's schedule on a calendar, then see how much is left on each project in a zoomed-out calendar to decide if there's space for one more project or not. When it's all done, you can then see an overview of your entire company's profit, costs, time spent across all projects, and more.

- **Magnetic Price**: $25/month per user for full features.
- For a deeper look at Magnetic's features and pricing plans, check out our Magnetic review.
- See Magnetic integrations on Zapier.

Project Bubble

Best for: rescheduling client tasks in a click
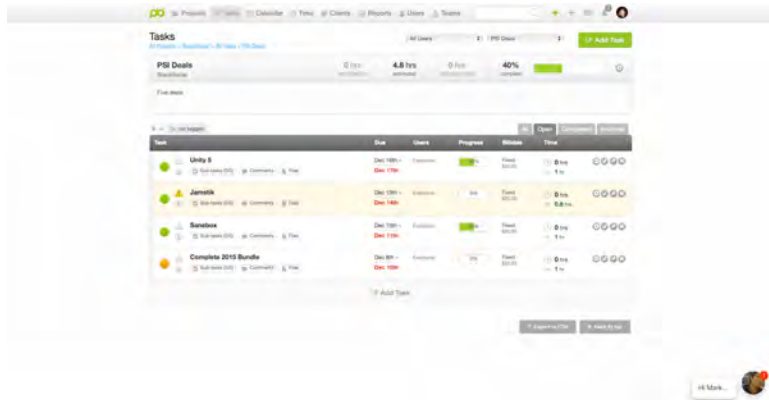
When you get overwhelmed with client projects, Project Bubble's simple rescheduling tools will be a lifesaver. Just break projects down into tasks and subtasks, and link each subsequent task as dependent on the former. Then, when you need to reschedule things, just drag the first task to its new due date, and every linked task will be rescheduled along with it.

Starting off new projects is simple, too, with templates and recurring tasks. You can track time and resources being spent on projects, to make sure there's actually space for the next project before you take it on. Then, when the project is done, Project Bubble will turn your work into a report with graphs and info for your clients.

- **Project Bubble Price**: From $19/month Solopreneur plan for 10 projects and unlimited users.
- For a deeper look at Project Bubble's features and pricing plans, check out our Project Bubble review.
- See Project Bubble integrations on Zapier.

Zoho Projects

Best for: projects of all sizes in one place

Every project doesn't look the same. Some are ongoing, with to-
dos always being added, while others are limited to a specific
timeframe—and need to be invoiced. Zoho Projects is ready for
them all. It includes almost every feature a project management app
could, with milestones and time tracking, kanban and Gantt charts,
forums and live chat. They're each designed around more tradi-
tional project management styles—kanban boards show columns of
priority or assignment, instead of the traditional free-form kanban
columns—but that keeps everything working together while still
offering unique views and tools.

That makes it easy to use it for every single thing your team works
on. Perhaps you need an on-going project with simple to-dos and a
forum to discuss internal processes, while your developer projects
need milestones and tracked time, and that client project needs
a way to send out invoices. You can manage them all in Zoho
Projects, with team chat and a personalized dashboard to tie them
all together.

- **Zoho Projects Pricing**: Free for 1 project; from $25/month
  Express plan for 20 projects, 5GB storage, and unlimited
  users.

- For a deeper look at Zoho Projects's features and pricing plans, check out our Zoho Projects review.
- See Zoho Projects integrations on Zapier.

Active Collab

Best for: managing team and client projects together
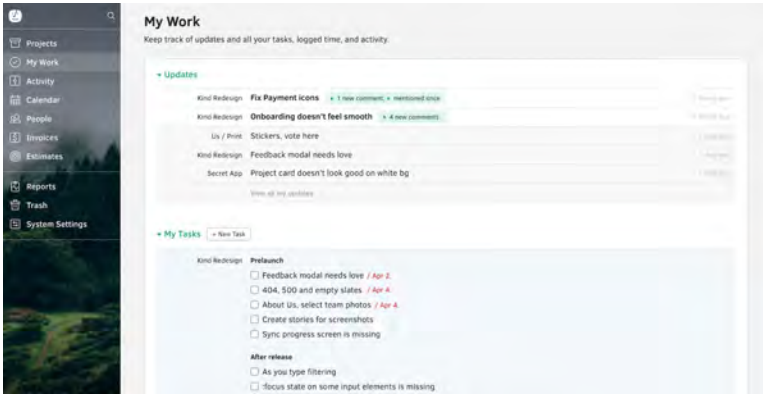
Internal and external projects have different requirements, but they still contain tasks and notes your team needs in one place. Active Collab can manage them all, with internal projects focused just on tasks while client projects also have a budget and client view. You can then share your work with a client and make sure task time stays within budget, while freely planning your internal projects.

Each project gets its own place to live with unique task lists and notes, but your own tasks and relevant updates from all projects will show up in your personal dashboard so you won't miss anything. And, you can view any project's tasks in a list, kanban board, or Gantt chart, so everyone on the team can work the way that fits them best.

- **Active Collab Price**: From $25/month for 5 users; $499 for self-hosted.

- For a deeper look at Active Collab's features and pricing plans, check out our Active Collab review.
- See Active Collab integrations on Zapier.

Freedcamp

Best for: free project management with add-ons
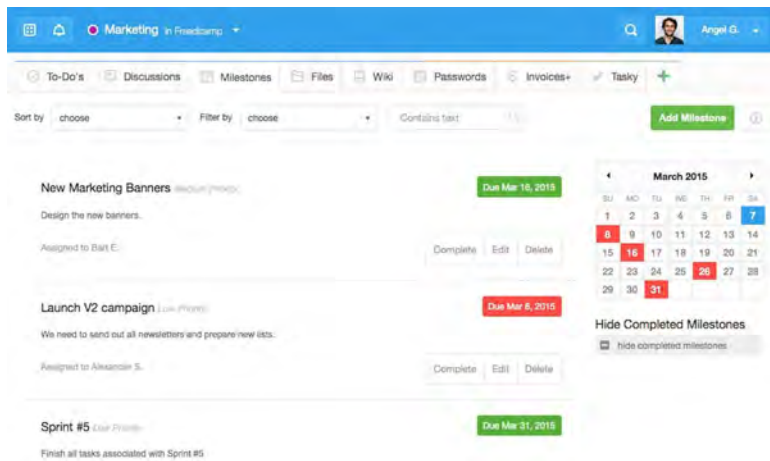
Freedcamp promises that project management doesn't have to break the bank. It's 100% free for core project features, with reasonably priced upgrades to add extra storage, invoice tools, a wiki, and more. That lets you start projects out for free, then upgrade as you bring on clients and need more features to collaborate.

You can organize projects in nested lists or kanban boards, with milestones to focus on the big goals and a detailed calendar view to see what's coming up over the next week or month. Freedcamp stores everything about your project in one place—including discussions, shared team passwords, and files—so you'll never have to search for the right thing to get tasks done. And when you need to send out invoices or track more details about clients, those extra upgrades are only a click away.

- **Freedcamp Price**: Free for unlimited projects and users; from $2.49/month for 1GB storage; $6.99/month for Invoice+ add-on.

The Best Customizable Tools for Project Management

All projects don't fit the same mode—and there might not be a project management app that's designed with your specific work-flow in mind. You need a feature from here, a report from there, and suddenly it seems like you'd better build your own project management app.

Don't start coding. These apps are each flexible enough to manage your projects, with just the features you need. When you want live chat and custom fields, kanban and gantt charts, perhaps with a contact management tool on the side, these are the apps you can use to build a customized project management tool in minutes.

App		Best to:	Free for:	Paid plans from:
Smartsheet		Use smart spreadsheets to manage projects, plans, and other data in one place.		$10/mo./user
Podio		Build apps for everything you need, and connect them all with an internal social network.	5 users	$9/mo./user
Redmine		Create the self-hosted project management tool you want with hundreds of plugins and themes.	∞ self-hosted	
Odoo		Get apps for everything your team needs for projects and more, and run them on your own servers.	∞ self-hosted	$25/mo./user

Smartsheet

Best for: a spreadsheet turned into a Gantt chart
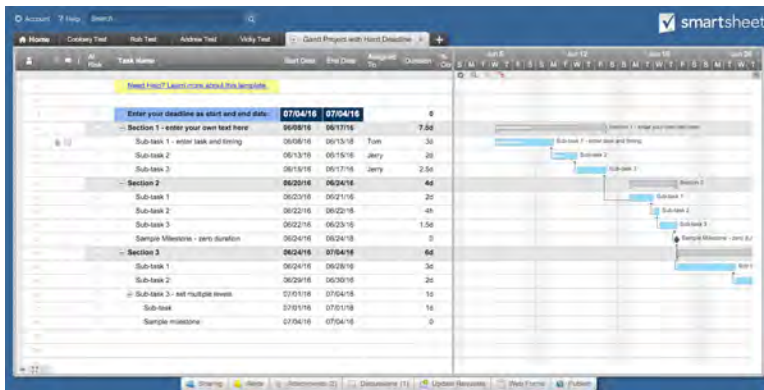
Love organizing your projects in spreadsheets, but wish they had a few more of the features that project management tools offer, like comments, notifications, and custom views? Smartsheet may be just what you need. It's a spreadsheet app, one that lets you keep all of the documents you're working on open at once in a tabbed view. But it's also a project management app, with tools to build a task workflow and visualize project due dates right inside your spreadsheets.

You can add indented sub-rows, and fold them under their parents

for simple project hierarchy. Add checkboxes for tasks, attach files to any row, and write in comments that can notify anyone on your team. Then, switch over to the Gantt chart view, and you can quickly see how long your spreadsheet-based project will take to complete. There are even conditional reminders, so you can get notifications whenever a project hits a specific status, a task with a certain name is added, or a due date is coming up. And, it's still as flexible as any other spreadsheet.

- **Smartsheet Pricing**: From $10/month per user Basic plan for unlimited collaborators, Gantt charts, and forms.
- For a deeper look at Smartsheet's features and pricing plans, check out our Smartsheet review.
- See Smartsheet integrations on Zapier.

For other tools to manage data in a spreadsheet, here's our roundup of the best spreadsheet apps.

Podio

Best for: customizable, connected apps for everything
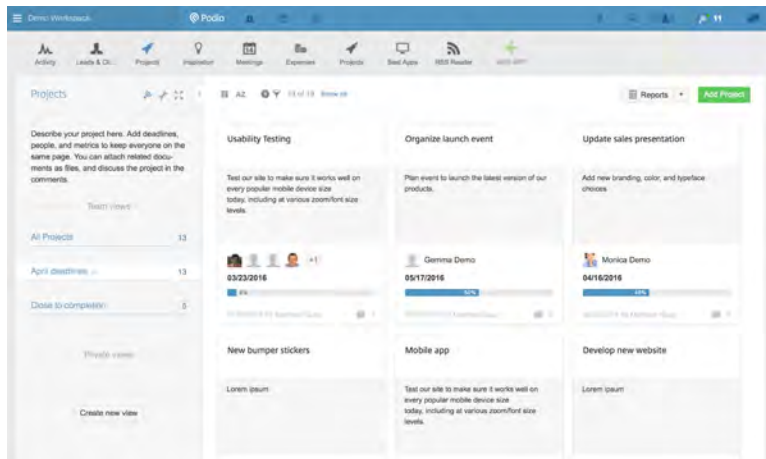
Podio is a flexible app builder, with pre-made apps for a wide variety of things—including project management. You can use their templates, or build your own with simple fields and quickly customize their appearance to show tasks on cards or data in spreadsheet-style lists. Each app you build can reference from the others—perhaps to pull inventory count into your projects, to make sure you have everything on hand to get your work done.

All your Podio apps are tied together on your dashboard, with an internal social network that shows updates from every app *and* status updates from your team. There's live chat, too, There's live chat, too, so you can discuss roadblocks and keep your project on track.. And if you work with other tools, Podio lets you add data to any app via a web form, email, CSV files, or RSS feeds, for a simple way to jumpstart projects with your files and templates.

- **Podio Price**: Free for 5 users; from $9/month per user Basic plan for core features.
- For a deeper look at Podio's features and pricing plans, check out our Podio review.
- See Podio integrations on Zapier.

For other tools that let you build customized, database-powered apps for projects and more, check out our roundup of the best database builder apps including Knack, QuickBase, Airtable and more.

Redmine

Best for: self-hosted project management with the features you need
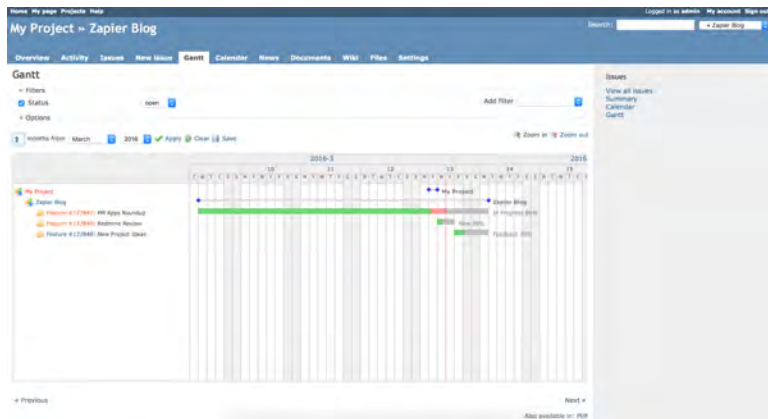
You can't fully customize Redmine without writing into Ruby on Rails code—something you *could* do, though, if you're so inclined since the entire tool is open-source. But the feature you're looking for might already be out there: the Redmine community has built plugins to add scrum, kanban, CRM, time tracking, lifecycle management, and hundreds of other features.

Redmine looks a bit like the original Basecamp, with tabs for your tasks, issues, discussions and other tools, but its workflow is far different. Instead of tasks, Redmine is focused on issues, with workflows to fix bugs, add features, and ship those changes in releases, complete with a Gantt chart to track due dates. It comes with a wiki and forum to document and discuss your work, along with a diff view to see changes to documents and code files in your

projects.

- **Redmine Price**: Free open-source.
- For a deeper look at Redmine's features and pricing plans, check out our Redmine review.
- See Redmine integrations on Zapier.

Odoo

Best for: self-hosted apps for every part of your business
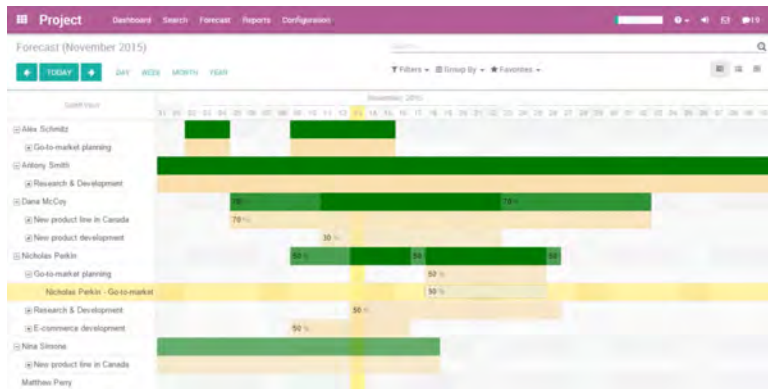
When you need apps for a dozen different functions, it can take forever to find the perfect app for *each* task. Odoo puts hundreds of tools—from eCommerce and CRM tools to an intranet to collaborate with your team—under one umbrella, so you can manage everything about your business in one place. Its project management tool includes both kanban and Gantt chart interfaces, to organize and schedule tasks easily in the same app. Include time estimates in projects—perhaps based on the last project's reports—and its forecast view will estimate each team member's workload for a more accurate estimate of when the project can be completed.

The project tool itself includes core features like kanban boards, Gantt charts, and a calendar for planning your work. Then, you

can customize your workflows by adding other Odoo tools to the
mix. There's apps time tracking and invoicing for client projects,
a live chat app to communicate with your team, a CRM to track
your suppliers, and more. Each Odoo app integrates with the others,
so you can pull time logs into tasks, tag contacts with the projects
related to them, and see events from the Odoo calendar alongside
your projects.

- **Odoo Price**: Free self-hosted Community edition; from $25/month
  per user Online plan for Project app.
- For a deeper look at Odoo's open-source features and pricing
  plans, check out our review of the self-hosted version of
  Odoo, OpenERP.
- See Odoo and OpenERP integrations on Zapier.

Bonus: Download a Project
Management Apps Cheat Sheet
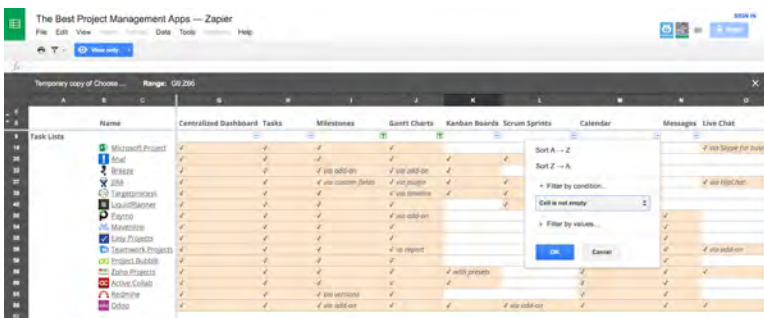
Can't decide which which project management app would be best
for your team? Perhaps you need a simple list too, but also need to

chat with your team—or maybe you need a client-focused project app with a kanban tool to organize your workflow?

We've made a cheat sheet just for you. It list each of the apps in this roundup, with a table of 20 top features so you can sort through the apps and see exactly which one would be best for your needs. Just download a free copy of *The Ultimate Guide to Project Management* eBook from the Zapier Learning Center to get a copy of the quick reference guide. Then check out our project management apps spreadsheet where you can sort and filter each app by its features, pricing plans, and more.
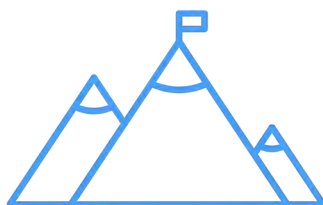
Your project's a mountain. An app can't climb to the summit for you, and it won't push you up the slope against your will. But the right tool can help ease the ascent, giving you a foothold where you can plan your next adventure.

The perfect project management app for one team won't be the best for another—you each have unique needs, workflows, and goals, each of which call for a different tool. So try the three or four apps that seem most like they'd fit your team. See how they feel: do they help your projects make more sense, or do you feel like you have to push your projects into a mold and force the app to work for you?

It's like trying on new shoes—one pair might look the nicest, but you'll *know* when you've found the perfect fit. Then, it's time to get everyone onboard, and plan your next projects inside your new project management app.

Before long, you'll have scaled yet another mountain, and it'll be time to click *New Project* all over again.

Now that you know some of the best project management apps, which one are you going to choose for your next project?

Can't decide? You're not alone. Choosing a project management app is a tough decision, since it affects so much of your team's work and productivity. In the next chapter, we'll look at how other project managers choose project management software, with insights that should help you pick the best tools for your team.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/best-project-management-software/.

Written by Zapier Marketer Matthew Guay.

Image Credits: *Mountain climbing photo by Shaylor via Flickr.*

Chapter 6: Get Organized: How to Pick Project Management Software in 5 Steps
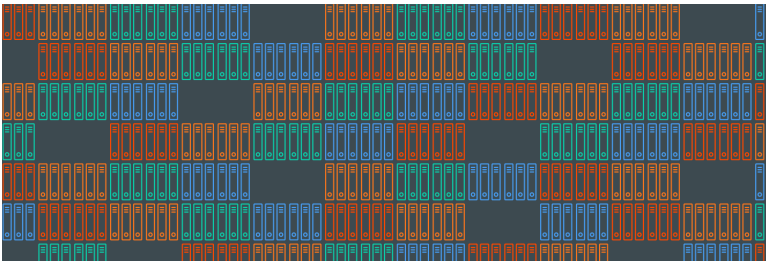
You thought committing to a to-do app was tough? Try getting your entire team on-board with a single project management solution, and convincing them to stick with it over the course of a major project.

That's the challenge when hunting for project management software: You need to find a tool with the powerful features you need, and get buy-in from your coworkers. It's a daunting task.

To take some sting out of the process, we asked the experts for their tips on picking the best project management app. According to Martin Müntzing, head of product at Podio, good project management software is "any tool that aligns with how you best execute projects your own way is best."

So where should you start to find a tool like that? Niki Gallo Hammond, a senior project manager with technology firm Jackson River, suggests identifying your challenges and constraints.

"Are you looking for something to help organize assets?" says Hammond. "Something to facilitate more fluid communication between team members or clients and vendors? Something that can support complicated scheduling or budget tracking?" List those answers, and find the app that matches them for the perfect project tool.

But instead of bogging yourself down with an endless list of questions, try this five-step process instead, built on advice that we gathered from five project management experts.

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1. Research the Collaboration Features

Does this tool give my team the tools and flexibility to work together?

If you're investing in new software—instead of just using the personal apps you use for your own tasks—you'll likely also want to use it with the whole team. The software you choose should be collaboration-friendly in a way that meets your needs.

"I geek out on my own with a lot of tools, but only a few actually have an incremental benefit that's worth the cost of switching with a multi-person team," says Paul Cothenet, who has worked as a product manager at a venture-backed startup for five years, and is now the CTO of MadKudu, an analytics company.

Try picking something that fits the way your team already communicates and works. Post-it Note-covered whiteboards are a staple in many offices, for example. But for dispersed teams, Cothenet suggests Trello as a web-based alternative. Once you hit three or more separate teams within the company, try something meatier like JIRA.
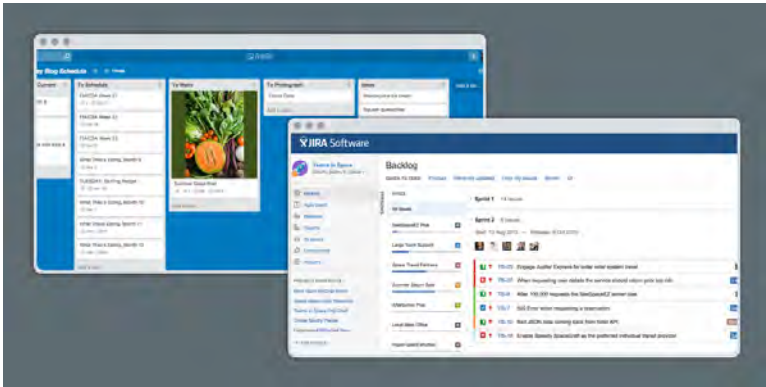
Cothenet also suggests test-driving a tool's collaborative features with a small, committed group within your team. This kind of pilot program will likely uncover some of the issues and benefits that will only show up at scale.

For Müntzing's team, transparency is a key part of collaboration. And working at Podio has only made him appreciate the platform's function more.

"Podio allows me to structure my work—all work, really—that my team is involved in, in a way that enables full transparency to the rest of the organization," he says. "The way we choose to implement that is to enforce openness and engagement from all employees, encouraging everyone to chip in with suggestions, share subject knowledge, and voice opinions early and often. That's what we've found generates the most value for the team as well as our product users."

> Start out your research for the best tool for your team with Zapier's roundup of *50 Best Project Management Apps*—including a comparison spreadsheet where you can sort apps based on twenty top features.

2. Calculate and Justify the Cost

"The biggest mistake you can make with productivity software is to add five minutes of extra work to each member of your team to save you five minutes." - Paul Cothenet, CTO at MadKudo

Do the productivity benefits of this tool outweigh the time and money we'll spend on it?

In the short-term, introducing new project management software to your workflow will cost a lot of time and money. But finding the right solution makes projects exponentially easier, making the software pay for itself.

Before you dive into a new tool, weigh the cost consider the time and money you'll spend on the software.

Hammond says that when it comes down to dollars and cents, the variance is huge: Some enterprise solutions can cost hundreds of thousands of dollars to implement throughout a company, while other teams get by with $50-per-month online tools.

"Rather than aiming for a particular number, I think it's important to research the landscape of products available to meet your needs, and compare the cost of buying and implementing the software versus the cost of not having it," Hammond says. "Factor in the time you'll save, errors avoided, and opportunities previously missed."

Müntzing tries to price software at less than the sum of the value it provides, or the sum of the licenses of other products it replaces.

"Someone has to be able to provide a total-cost-of-ownership calculation that proves that investing in this software saves your organization money," he says. "Freemium products allow a way to try the product without any up-front commitment, and that's great, but the ROI still has to be there."

If your choices aren't dictated by budget, let convenience reign. "Is this something that is going to automate a part of my workflow or make my life easier? If so, I'll use it," says Johan Lieu, a product manager for Wufoo.

To gauge whether a software's cost will provide well-rounded benefits for your team's various needs, test it on small scale.

"The biggest mistake you can make with productivity software is to add five minutes of extra work to each member of your team to save you five minutes," Cothenet says. "Always wait as long as you possibly can before introducing extra complexity."

For Cothenet's current three-person team, all he really wants is status reminders with a description; anything else would be a waste of effort.

"But when I was working with 20 engineers, I needed the bug reports to include a certain number of details. Otherwise, everyone would lose a ton of time trying to reproduce it," he says.

Use the simplest system until it's clear you've outgrown it, don't use project management software that takes more than 30 minutes to set up, and sell the new tool to your team.

"Show the value, do demos, help people get started," Cothenet says. "And most importantly, lead by example."

3. Try the Alternatives (then, Try More Alternatives)

"I simply don't trust any software company that won't let me use the full software package for a specific free trial period. … I want to kick the tires. Hard." > - Heather Hendricks, Freelance Project Manager

Does this tool meet my needs better than the alternatives?

Choosing project management software is like apartment hunting: it's tempting to jump on the first great place you walk into. Once you're moved in, you see the flaws.

Fortunately, with project management software, you can sample a bit of everything before writing the first rent check.

When hunting for new software, think about what it would take to learn the new system, and whether or not the benefits of your current software remain in place.

"For me, the software evaluation process often starts with a least-resistance approach, looking at current team behavior, allowing a freedom of choice as a starting point," Müntzing says. "If that proves the current software of choice is not sufficient for process needs, my first choice would be to look for connectivity and integrations to more full-featured products."

If upgrading the current tool fails, Müntzing starts the top-down approach, surveying managers and stakeholders about their requirements for new solutions.

A great way to try out different options at little to no cost is simply to use the free trial, or ask the provider for access. More often than not, software providers are happy to hook you up with a short trial or training session.

"Personally, I often look for a low-to-no barrier to get started—free or no-credit card trial—and a pricing model that allows me to predict what it would take to scale my investment. From there on it's all about experimentation," Müntzing says.

If you're serious about a big switch, freelance project manager Heather Hendricks warns against settling for software without a full-featured trial.

"I simply don't trust any software company that won't let me use the full software package for a specific free trial period," she says. "As project managers, we have a lot on the line if we endorse a

platform that ends up being the wrong choice. I want to kick the tires. Hard. I want other people on my team to test it."

"Seeing a demo is simply not the same as exploring the software freely and unrestricted for a few weeks," Hendricks says. "Sales people that encourage this unhindered access are the ones that I trust."

But even with an in-depth look at the program, it's important to examine what it offers in its leanest version. Determine if the extras are just that: extras. Bells and whistles aside, stellar project management tech will do everything you need it to in its simplest form.

Hammond suggests looking for a user interface that's intuitive and allows you to perform common tasks without complex workflows. Also look for advanced search options, reporting, an emphasis on customization, and connectivity.

"It should play well with others," Hammond says. "It's typical to use different systems for requirements management, scheduling, bug reporting, and accounting, but to manage a project strategically and be able to predict and address risks, you'll need a holistic, summary view of all of those things periodically."

> **Tip**: For *project management app integrations*, rely on *Zapier, a tool that connects more than 500 apps.*

4. Get Feedback From Your Team

> "I sign up for something and then use it exclusively for a couple of days for the task it was built for. If it's better than what I was using previously, it wins. If not, I'll go back." - Johan Lieu, Product Manager at Wufoo

Is this something that my team will actually use? Does it solve their problems?

When you start testing a new tool, you're more likely to get feedback (with less frustration) if you let your team dip their toes in the water, rather than dunking them in the pool.

"Just be quick and simple about it," Lieu says. "Don't get caught up in overly customizing something that may not add value to your workflow. I sign up for something and then use it exclusively for a couple of days for the task it was built for. If it's better than what I was using previously, it wins. If not, I'll go back."

Cothenet says the most common challenge you can expect during a trial period is team inertia. Make sure the trial period is short enough that it's reversible, but long enough to suss out any deal-breakers.

Henricks' test criteria is simple: "Would it take more than 15 minutes to show a relatively smart person how to use this?" she says. "It's the platforms that can be utilized almost immediately by new users that get my attention."

Hammond says that while it's tempting to download tools and play around with them, you should always have a plan for how it fits into your workflow, and agree upon goals with your team.

And after you've made a decision that's based on team feedback, usage and adoption, Cothenet suggests re-evaluating your decision often—about every three months.

5. Outline Your Implementation Plan

> "If the project manager is the only person who ever touches the project management software, it's probably not being used to its full potential and has a high risk of failure or abandonment." - Niki Gallo Hammond, Senior Project Manager at Jackson River

How can I help my team use this new tool?

Even tech-savvy teams are creatures of habit, so it's important to draw up a plan for how you'll integrate the new software into your daily workflow.

Off the bat, Hendricks only trains the stakeholder on what's absolutely necessary for their role. If they only need to sign in and reply to comments from their teammates, that's the extent of the training she provides. Once they feel comfortable, they can start to explore.

Then, after outlining an implementation plan, make sure you have the tools to execute on it—integrations to connect with old software, documentation on how you plan to implement the app, and more.

"Get your ducks in a row process-wise before you implement new software," Hammond says. "Some people's day-to-day tasks will change, or information they used to find one place will now be in another place. Prepare everyone for those changes in advance."

But sometimes, it's as simple as getting people to give the new tool a spin. "If the project manager is the only person who ever touches the project management software, it's probably not being used to its full potential and has a high risk of failure or abandonment," Hammond says.

The Software Picks of our PM Panel

Now it's time to start looking for the perfect app for your team. We asked our panel of project managers what project management software they recommend, to help jump-start your search:
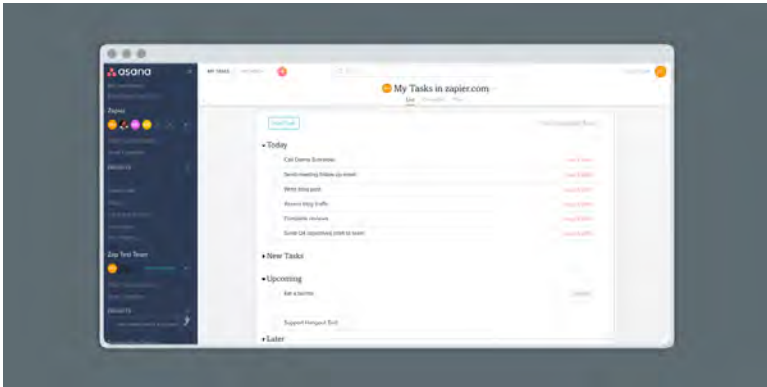
Paul Cothenet, who has worked as a product manager at a venture-backed startup for five years, and is now the CTO of MadKudu, an analytics company, recommends Asana for managing a team's technical backlog and time-sensitive tasks.

Related: Read our review of Asana.

Heather Hendricks, a freelance senior digital project manager whose experience includes seven years in project management at Microsoft, recommends Basecamp. "Its beauty is in its simplicity," she says. "I don't like to overwhelm my teams with files, emails,

spreadsheets and other project detritus that impacts their ability to focus. Basecamp offers a slick interface that doesn't try to win the user over with bloated features. It does the most critical collaboration tasks really well—project communication, file sharing, project timelines and multi-project integration. It's like the calm in the storm."

Related: Read our review of Basecamp 3.
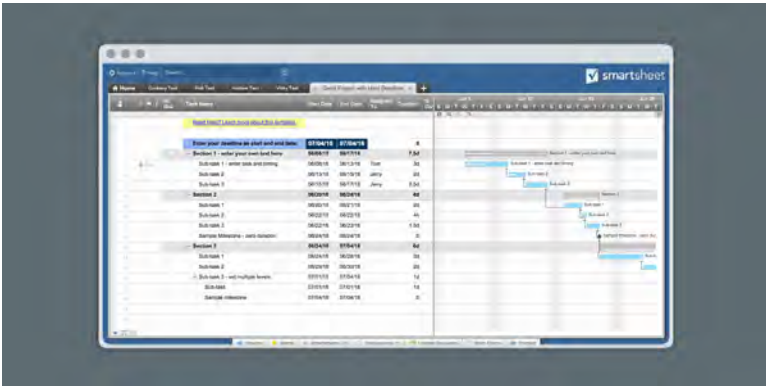
Niki Gallo Hammond, a senior project manager with technology firm Jackson River relies on Smartsheet, a flexible tool for project management with Gantt charts, schedules, to-do lists, inventories, and other spreadsheet-based references.

"It comes with a ton of templates that I've used and modified heavily, and it's web-based so it's great for collaboration," she says. "It's flexible, and simple enough to be useful for small teams and solo projects, but powerful and collaborative enough to support medium-to-large ones."

Related: Read our review of Smartsheet.
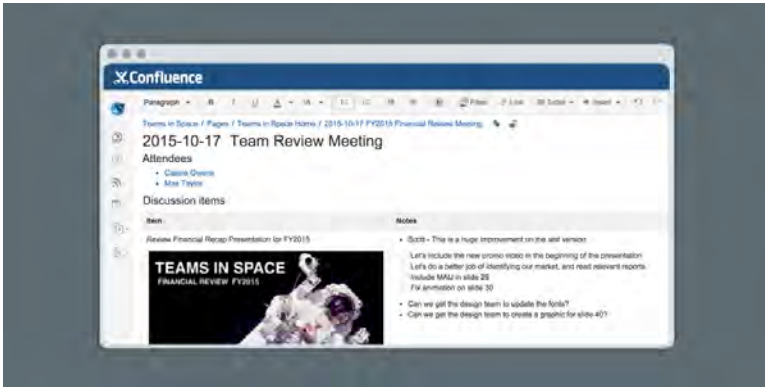
Johan Lieu, a product manager for Wufoo, employs Confluence for tech and product specs. Confluence helps teams plan and organize projects, then weaves together collaboration and documentation tools to help them execute. It's a hub for all of your team's most important work, and best of all it's simple to pick up.

Find New Project Management Apps to Test Drive

We're app nerds at Zapier. Our team is always on the hunt for the most compelling and most powerful tools on the market. And as we put them through the ringer, we make it a point to share the features and flaws that we find.

If you want to hear about the outstanding apps that we come across—for project management or otherwise—check out our app reviews. We put apps to the test so you don't have to, covering key features, pricing, use cases and competitors in an easy-to-digest format.

Not sure where to start your search for a project management platform? Here are some other favorites from our panel—and be sure to jump back to Chapter 5 for other great options:

- Active Collab
- Asana
- Basecamp 3
- MeisterTask
- Projectplace
- Teamwork Projects
- Smartsheet
- Trello
- Wrike
- Wunderlist

Still haven't found the app for your team? Check out our other project management app reviews, or subscribe to our app reviews emails to get our latest app reviews—including reviews of the best new project management apps—in your inbox each Monday morning.

Beyond Your Project Management Software Search

Let's be honest: None of these project management tools can tackle *everything* you need to do at work. Sometimes it's better to rope in software that handles a specific part of your workflow masterfully.

For everything in-between, our project management experts suggested these tools:

- Slack and Skype for chatting with your team
- Balsamiq or Pixelmator for working on designs and mockups
- 1Password for sharing passwords with your coworkers
- Soulver for quick-and-easy math
- Keynote for presentations and UI prototyping, or Omnigraffle for wireframing

- Google Drawings for quick illustrations

Still having trouble deciding which app to use for your projects? Maybe that's the problem. You might need *apps* instead of just one app.

Most teams end up with an entire project management toolkit, a set of apps that work together to juggle their projects. In the next chapter, we'll look at 13 team's project stacks to help you figure out which apps you could use together in your projects.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/how-to-choose-project-management-software/.

Written by freelance writer Jane Callahan.

Chapter 7: Project Management Software Stacks: The Apps That 13 Companies Use to Manage Projects
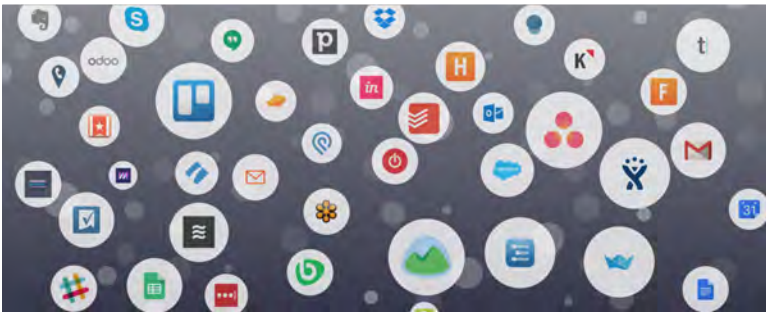
You've found a project management system that works for your team, tweaked your apps to fit that workflow, and boiled your goals down into clear next-steps. Now, it's time for the real work.

But sure enough, roadblocks appear. When your team gets into the weeds, you find it difficult to collaborate, share knowledge, adjust to unforeseen challenges, and push your project to the finish line.

Projects are messy structures that quickly take a life of their own. And if you want to tame them, you need a whole team of specialized apps.

Your project management app isn't always enough on its own. You'll also need tools for storing notes, chatting with your team, gathering feedback, and scheduling meetings—along with any other

apps that fill gaps in your workflows.

Different projects call for different apps—and every team is comfortable with a different stack, or toolkit. Let's look at project management app stacks from more than a dozen teams across a range of industries, to see how they turn projects into reality.

Stampede Design's Stack for User Experience Design
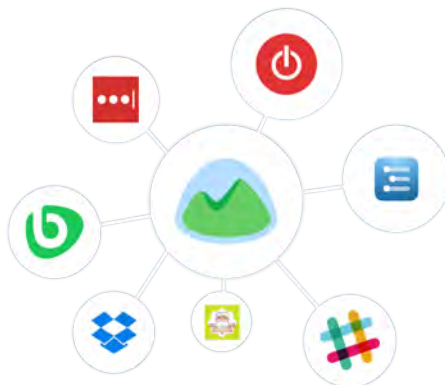
Crafting delightful user experiences for clients takes a lot of communication. After deciding on goals, you'll need to keep your customers up-to-date on your progress, any design drafts, and changes to your plan.

Now try doing that with a team of remote designers and developers who have varied work hours. That's how they tackle client work at Stampede Design, turning concepts into responsive websites and interactive experiences.

Pulling off a project requires more than a dozen apps. "We start with project creation in Basecamp," says Stampede culture manager Zana Fauzi, "kicking it off with the client and asking for assets before we start."

Before assigning those tasks, they turn to scheduling tool Resource-Guru to see who has open time, and to estimate when the project can be shipped. "We weigh in the workload and working hours of all our team members across different time zones," Fauzi says.

The Stampede Design team's workplaces

With the timeframe figured out, they can log those dates and assignments in Basecamp. Next, they create a folder in Dropbox for the project, so clients can have access to any design assets.

All of Stampede's conversations happen in Slack—a chat app—and they connected it to their other apps with Zapier. They pipe in notifications about project changes, submissions to their Gravity Forms form, and posts on their social media accounts. They also use Slack to chat with clients: "We have dedicated Slack channels with clients, or otherwise communicate in Basecamp," Fauzi says.

Zapier Integrations:

- Post new Basecamp activity to Slack
- Post new Gravity Forms submissions to a Slack channel
- Share new Facebook Page posts in Slack

Time tracking app Toggl keeps the project focused and on-time. "It ensures team members do not go over the estimated time limit, and also checks if they are overwhelmed or underutilized," Fauzi says. Once a project launches, the team celebrates with little rewards on Bonusly.

Every tool plays a different part in keeping the Stampede team focused, so they can keep their clients happy.

Apps

- **Project Management**: Basecamp
- **Scheduling**: ResourceGuru
- **Time Tracking**: Toggl
- **File Sharing**: Dropbox
- **Communication**: Slack & Basecamp
- **Rewards**: Bonus.ly
- **Notes**: Workflowy & Google Keep
- **Shared Logins**: LastPass

Read our in-depth reviews of some of the apps in Stampede's stack: Basecamp, Toggl, Dropbox, and Slack.

Thumbprint's Stack for Printing Logistics

Sometimes you need to see a project in a different light, with one view for planning and another for assigning tasks. That's why print logistics company Thumbprint relies on both Trello and Wunderlist for their projects.

"Trello allows us to show projects along a workflow and how they are progressing," says Thumbprint COO Tod Ellington "Wunderlist allows us to see tasks by teams and clients." To help Trello and Wunderlist talk to each other, they rely on Zapier.

Zapier Integrations:

- Create Wunderlist tasks from new or moved Trello cards
- Create Trello cards from new Wunderlist tasks

Every project follows the same basic steps, so the Thumbprint team uses workflow checklists in Process Street to keep track of everything. Toggl helps them keep track of time spent on projects, while a Klipfolio dashboard shows the stats for each department's projects.

Team password manager OneLogin ties everything together, the
"starting point for each employee, where they access the software
specific to each role," says Ellington. That, along with the Zapier
integrations, keeps their diverse set of project tools connected so
they can use the best tool for each task.

Apps

- **Project Management**: Trello & Wunderlist
- **Checklists**: Process Street
- **Time Tracking**: Toggl
- **Stats**: Klipfolio
- **Shared Logins**: OneLogin

*Read our in-depth reviews of some of the apps in
Thumbprint's stack: Trello, Wunderlist, and Toggl.*

Bryan Landers' Stack for Product Design Consulting

Sometimes working with clients means using their preferred tools—even though they might not be your favorites. That's what product designer Bryan Landers has discovered as he juggles client work and his Mission & Values podcast.

"I use Wunderlist for my own personal tasks, and also use Trello for tasks when the card-based, drag-and-drop UI is better," he says. "When clients have their own apps for task management, I will use them if I think that it will save time with communication. This is definitely challenging because it means managing tasks across multiple apps, but it's worth it for the increased transparency and alignment with the client."

Sticking to your own apps when you have one or two clients works fine. But when you're communicating with 10 different teams simultaneously—each one with its own apps and workflows—switching from platform to platform gets old, fast.

The one thing that most project management tools have in common, though, is that they send notifications via email. Landers uses that to his advantage: his inbox acts as a central notification hub, and he triages work from there.

But a full inbox can be overwhelming—especially with notifications coming in at all hours. "I find myself always tweaking notifications because one benefit of being a freelancer is that you are in charge of managing your own time," Landers says. "If you don't want to be contacted after 10pm by a client, then it's up to you to turn off notifications for all of these apps."

If email is the common denominator among your team's tools, Zapier can help you control the flow of information. You can update clients about their projects via email, without worrying about which project app they're using. Most other apps—including design feedback tool Zeplin—include email notifications to loop clients in. And when an email isn't enough, Landers starts a Skype or Google Hangouts call. It's just enough to give some order to a maze of client projects.

Apps

- **Starting Projects**: Email
- **Project Management**: Trello & Wunderlist, or client's own project management app
- **Communication**: Skype & Google Hangouts
- **Notes**: Google Docs or client's perfered app
- **Design Feedback**: Zeplin & InVision
- **Notifications**: SMS via Zapier

Read our in-depth reviews of some of the apps in Bryan's stack: Trello, Wunderlist, and Google Docs.

Anguleris Technologies' Stack for Information Modeling
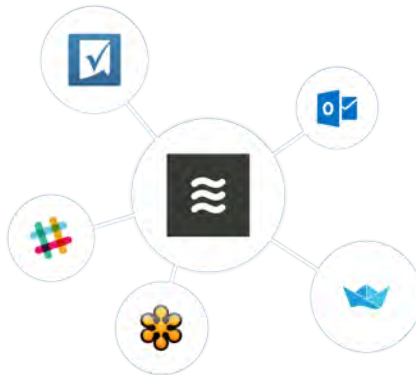
Mapping out a schedule is a crucial part of planning a successful project. That's why Anguleris Technologies uses three different tools to scope out dates for their building information modeling projects: Float, LiquidPlanner, and Smartsheet.

Each tool plays a role in a progressive scheduling structure, which
moves from short- to long-term goals. They need to see who has
time to take on new work, figure out when each task will be
completed, and then share that info with clients.

It starts in forecasting app Float, which the team uses to plan who's
working on what in the short-term (i.e. the next two weeks or so).

The Anguleris Technologies team

With the short-term plan in place, the Anguleris team creates a
new project in LiquidPlanner where they can schedule when each
task will actually be completed. They can then create a timeframe
in Smartsheet to share the expected completion dates with clients.
Outlook, Slack, and GoToMeeting fill the communication gaps,
helping their team discuss tasks internally and meet with clients.

Apps

- **Planning**: Float
- **Project Management**: LiquidPlanner

- **Scheduling**: Smartsheet
- **Communication**: Outlook, Slack, and GoToMeeting

Read our in-depth reviews of some of the apps in An- guleris's stack: LiquidPlanner, Smartsheet, and Slack.

StarOfService's Stack for On-Demand Services

Projects of different sizes require different apps. That's why the team at StarOfService—an app that connects people to service professionals like personal trainers and translators—never tries to force a "small project" app to do a "big project" app's job.

"We love Kanban-style workflows," says StarOfService co-founder Maël Leclair. They started out with Trello, but hit its limits as their projects expanded. "For us Trello is not scaling super well for large projects, so we keep it as a sidekick that complements JIRA." Trello gets the smaller projects, then they turn to JIRA for more complicated jobs.

Zapier helps keep projects running smoothly, no matter which app they're in. "We have a Gmail address that is used for reporting bugs," Leclair says. "We use a Zap to send those bug reports automatically to JIRA and Trello."

Zapier Integrations:

- Forward new emails to create Trello cards
- Add new Email messages to JIRA as new issues
- Send Amazon SNS JSON messages to Slack

"We also try to centralize as much information as possible into Slack," Leclair says. That's where they discuss projects internally, and Zapier also notifies them about alerts from their server by automatically sending the messages to Slack. "It helps us to identify issues early before they become a major problem," Leclair says.

Apps

- **Project Management**: Trello & JIRA
- **Scheduling**: Google Calendar
- **Communication**: Gmail & Slack
- **Notes**: Google Docs
- **Design Feedback**: InVision

Read our in-depth reviews of some of the apps in StarOfService's stack: Trello, Google Calendar, JIRA, Slack, and Google Docs.

Blue Ocean Robotics' Stack for Robotics Development

No, this isn't a science fiction movie: the team at Blue Ocean Robotics spends every day building robots that improve quality of life for humans. From industrial robots that pick parts and disinfect equipment to telepresence robots that help remote team members join in at the office, their projects are already part of workflows at companies around the globe.

To build those robots and market them, the Blue Ocean team relies on many of the same tools you might already be using. "We actually use a very streamlined set of tools in our project management," says vice president of marketing Thomas Midtgaard-Jørgensen. "We use Trello as the project overview, with the Scrum for Trello add-on which allows us to manage hours."
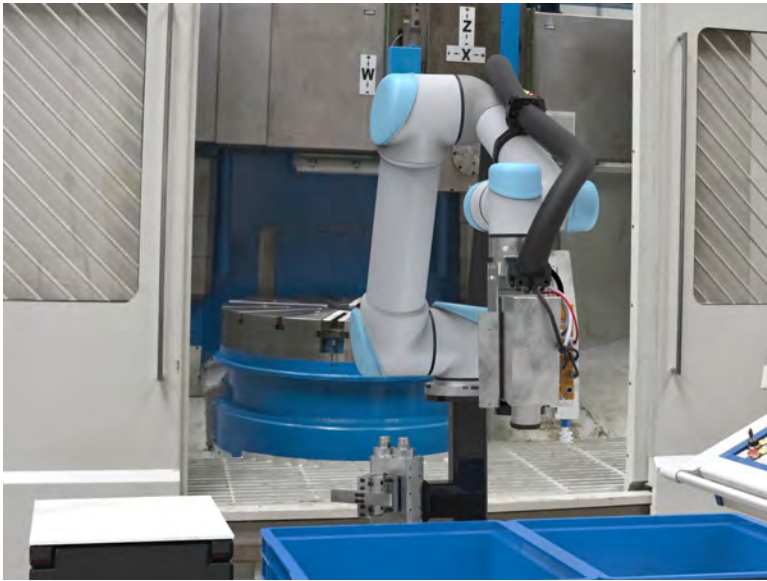
One of Blue Ocean Robotics' robots

Many of their tasks come in via Gmail emails, alongside their regular correspondence. "The best way for us to sort deliverables from information is to make tasks in Gmail," Midtgaard-Jørgensen says. "These tasks are then converted into Trello cards via a Zap."

Zapier Integration:

- Create Trello cards from new starred Gmail emails

After struggling to implement Evernote in their workflow, the Blue Ocean team settled on Trello for storing notes alongside their tasks and projects. But their communication tools—Slack for text chat, plus Skype and Google Hangouts for video calls—really help their projects hum along.

"If you do not communicate via daily scrum meetings and walk-abouts, then you cannot have a finger on the project's pulse,"

Midtgaard-Jørgensen says. "This element of transparency removes any doubts about where we're going with the projects."

Apps

- **Starting Projects**: Gmail
- **Project Management**: Trello with Scrum for Trello add-on
- **Communication**: Slack, Skype, & Google Hangouts
- **Notes**: Trello

Read our in-depth reviews of some of the apps in Blue Ocean Robotics's stack: Trello and Slack.

Tinkerbox Studios' Stack for App Development
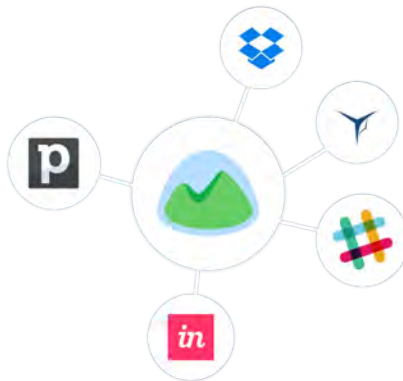
If you start a project off on the right foot, and get all of your to-dos lined up at the get-go, you won't waste time tracking down project info later. That's what Tinkerbox Studios—a design and development studio—has found with their projects.

"One of the most useful things we've got down pat is the onboarding
process for projects," says Tinkerbox Studios founder Jaryl Sim.
Whenever they win a deal in Pipedrive—their CRM—they need to
create a project in Basecamp, a Slack channel where they can chat
about that project, and a Dropbox folder. Then, they alert everyone
about the new undertaking.

Zapier handles that whole process automatically. From the deal in
Pipedrive, a Zap creates the project, Slack channel, and Dropbox
folder, plus sets up billing for the client. Then, "it sends us all an
email telling us where everything is, which cuts down a lot of
informal coordination to get things set up," Sim says.

That way, the entire team always has the data they need, so they
can focus on the project at hand.

Zapier Integrations:

- Create Basecamp projects for new Pipedrive deals
- Create Slack channels for new Pipedrive deals
- Create Dropbox folders for new Pipedrive deals
- Get Slack notifications for new Pipedrive deals

Apps

- **Starting Projects**: Pipedrive
- **Project Management**: Basecamp & an internal project management app
- **Communication**: Slack
- **File Sharing**: Dropbox
- **Design Feedback**: InVision

Read our in-depth reviews of some of the apps in Tinkerbox's stack: Pipedrive, Basecamp, Slack, and Dropbox.

Delve's Stack for Intelligence

No app can cover every project management method. Your best bet is to find a tool that does most of what you need, and then see if a companion app can fill in the gaps.

That's why the Delve team uses Basecamp with Workstack—an add-on that visualizes how long each task will take and whose

schedule is the most full. "Workstack provides the leadership team with a dashboard of priorities and project scheduling across projects," says Delve CEO Jeff Berkowitz.

Delve specializes in research projects in the political and business spheres. They use Dropbox to keep their files organized and in-sync, while Slack helps them communicate about everything related to specific projects. "We use Zapier to connect Basecamp to Slack, where all of our team and project communication takes place," Berkowitz says. That way, no one misses an update in Basecamp, and they don't need to be watching the app constantly.

Zapier Integration*:*

- Post new Basecamp activity to Slack

Apps

- **Project Management**: Basecamp
- **Scheduling**: Workstack
- **Communication**: Slack
- **File Sharing**: Dropbox

Read our in-depth reviews of some of the apps in Delve's stack: Basecamp, Slack, and Dropbox.

High Sails Media's Stack for Photography, Video, and Design
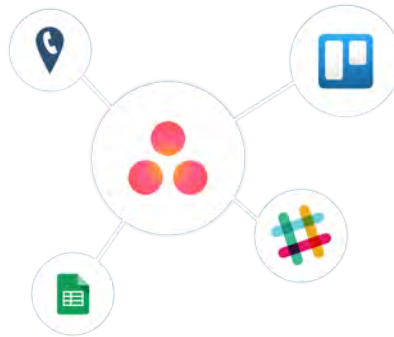
Running two companies at the same time means juggling a lot of tasks. But the High Sails Media team is pretty good at keeping multiple projects afloat simultaneously: they run their design firm alongside StopGoLove, their wedding photography and film company. Each project has a ton of moving parts, and they rely on Zapier to put each piece in the right place.

"We use Zapier to create Trello cards from multiple Asana workspaces and projects, as well as alert us in Slack when a new Asana task is created," says visual designer Jason McCutchen. "We also use it in the StopGoLove side to automagically migrate leads in our lead email list to our clients' email lists based on a field in a Google spreadsheet."

Zapier Integrations:

- Create Trello cards from new Asana tasks
- Create Asana tasks from new starred Slack messages
- Add Subscribers to MailChimp via a Google Spreadsheet
- Send messages on Slack for new CallRail calls

They also use Zapier to get Slack alerts about CallRail calls. That way, each task, call, and discussion is all in the same place.

"We worked very hard to get the Zaps to complement one another and work sequentially," McCutchen says. "Zaps have saved us more time and energy than I can probably even quantify."
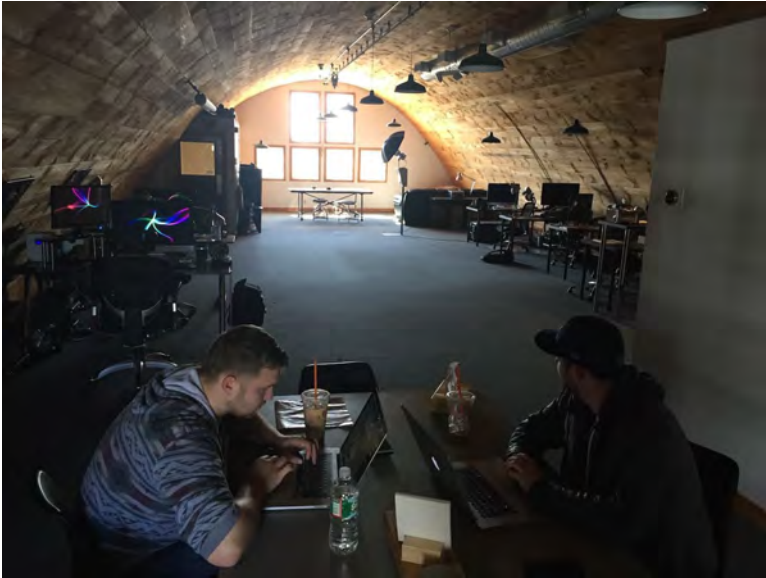
The High Sails Media team at work in their office, a 200 year old barn in Mendon, Massachusetts

Apps

- **Project Management**: Asana & Trello
- **Communication**: CallRail
- **Contacts**: Google Sheets

Read our in-depth reviews of some of the apps in High Sails Media's stack: Asana, Trello, and Google Sheets.

Bata Food's Stack for Food Export

There's very little room for error in the food exporting business. Miss your deadlines or forget a task, and you could end up with a container full of mushy, rotting products. That's why the Bata Food has a checklist to follow for each type of project.

"We prepared templates on Excel before for 2-3 different scenarios," says Bata Food consultant Burak Bardakçı. "For each sale, we import a template in this project in Todoist which assigns tasks automatically to the people in charge." That ensures nothing's overlooked.

A Bata Foods shipment

Zapier integrations keep track of everything else. They log leads in OpenERP, and use Zapier to share new customers on Slack. From there, each lead is automatically added to a MailChimp mailing list. "Any new action on OpenERP, such as "new quotation", "new lead/opportunity", or "new contact", sends a notification to a Slack channel so everyone in the team can track or search what is going on in the system," says Bardakçı.

Todoist tasks and upcoming Google Calendar events are also shared in Slack, to keep everything in one place. With Slack as the central hub for every activity, and Todoist templates ensuring that the same tasks are completed every time, the Bata Food team is able to tackle every project on schedule.

Zapier Integrations:

- Add new subscribers to MailChimp for new OpenERP records
- Send Slack messages for new OpenERP records

- Share new Todoist tasks in Slack
- Post approaching Google Calendar events to a Slack channel

Apps

- **Project Management**: Todoist & OpenERP
- **Communication**: Slack & Gmail
- **Scheduling**: Google Calendar

Read our in-depth reviews of some of the apps in Bata Food's stack: Todoist, OpenERP, Slack, and Google Calendar.

Conneqtify's Stack for Building Communities

Planning events requires coordination between a wide range of teams, something Conneqtify has solved with a form-powered project workflow.

"I ask a few questions in Typeform," says Conneqtify founder Oskar Wiklund "with those questions, I automate the entire workflow by adding info and deadlines to the tasks, and assigning them." The form starts off by asking what type of event will be planned— something that's useful for Wiklund when he's doling out to-dos.

"I assign different tasks to different people depending on what type of task it is: communication tasks to the communication team, logistics to the logistics team," Wiklund says. Zapier integrations help with that, and also queue up social media posts about the event right from the form.

Zapier Integrations:

- Create Trello cards from new Typeform entries
- Post new Typeform entries to your Facebook Page

Simple-yet-powerful workflows like these that help their projects go smoothly. "As a community builder, Zapier has allowed me to connect with more people than ever," Wiklund says. "I can automate the way we connect with customers and make it feel very personal and professional."

Apps

- **Starting Projects**: Typeform
- **Project Management**: Trello
- **Contacts**: Pipedrive
- **Scheduling**: Gmail with Mixmax plugin
- **Notes**: Evernote

   Read our in-depth reviews of some of the apps in Conneqtify's stack: Typeform, Trello, Pipedrive, and Evernote.

Interlike's Stack for Development
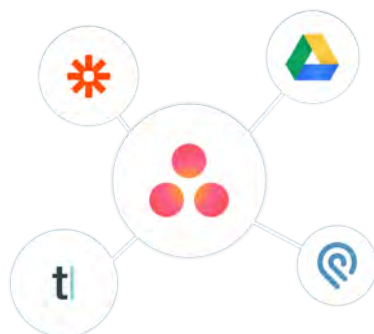
New projects mean new files (lots of them) and it's important to keep them organized. A detailed folder structure helps the team at Interlike—an online marketing platform—stay productive.

"We have company guidelines on project folder structure in Google Drive," says Interlike CEO Kirill Kaplun, "which allows us to have everything in its place, easily accessible and sharable." To make sure those folder structures are used every time, they rely on Zapier integrations to create the folders for new projects.

Each project—which, at Interlike, often means a new feature request or bug to fix—starts with a Typeform or Podio form. "We have processes, not just projects," Kaplun says. When there's a new bug or feature request, a team member will fill out a form. Then, Zapier does the rest. "Once project is initiated the correct folder structure is created, and Zapier creates events and appointments in corresponding calendars," Kaplun says.

Zapier Integrations:

- Add Google Drive folders for new Podio items
- Create Google Drive folders with new Typeform entries

- Add new Typeform entries to Asana as tasks

Zapier integrations keep their projects structured and organized, so their team can focus on building their app. And when they need to prototype a new feature, they often use Zapier to test it out, too. The integrations give them a quick way to prototype without code, so they can spend more time squashing bugs and improving their platform.

Apps

- **Starting Projects**: Podio or Typeform
- **Project Management**: Asana
- **File Sharing**: Google Drive
- **Prototyping**: Zapier

Read our in-depth reviews of some of the apps in Interlike's stack: Podio, Typeform, Asana, and Google Drive.

White Room Automation's Stack for Industrial Connectivity
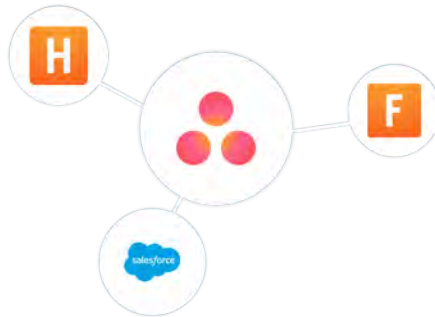
The team at White Room Automation has struggled to find the perfect project management tool.

"There are very few apps that do everything well," says White Room Automation principal consultant Ryan Plester. "Harvest is a great time-tracking tool, but its expenses are limited. Our accounting system is another good example: great for basic accounting but for getting into the details of product sales, we had to build custom objects in Salesforce."

Instead of using just one tool, they've found tools that work best for each task: Asana for tasks, Harvest for time tracking, and customized Salesforce objects for accounting. To tie everything together, they use Zapier.

"Zapier enables us to automate tasks that are easily repeatable but take up time when done manually," Plester says.

Zapier Integrations:

- Create Asana Tasks from Emails in Gmail

- Create Harvest projects from new Asana projects
- Add new Google Contacts contacts to Salesforce as contacts

Apps

- **Project Management**: Asana
- **Time Tracking**: Harvest
- **Scheduling**: Harvest Forecast
- **Accounting**: Custom Objects in Salesforce

Read our in-depth reviews of some of the apps in White Room Automation's stack: Asana, Harvest, and Salesforce.

Every project and team has different needs. For some, planning ahead is most important, the trick that helps their projects flow smoothly. Others need to look in a wide range of tools, and need something that pulls everything together. You might find that documentation, or checklists, or some other aspect is what makes or breaks your projects.

What's important is that you have a tool for every need your projects bring. Don't try to shoehorn tasks into a project management app that's not built for them. Instead, add on a new tool for that task, and use integrations—perhaps with the over 600 apps integrated with Zapier—to connect it to your projects and make everything run smoothly.

Start out by finding a project management app for your team with our roundup of the best project management apps—and feel free to use more than one if you need. Then, here are roundups of some other great business software to help with every other part of your projects:

- Form builder apps
- Checklist and Standard Operating Procedures Apps
- Notes apps
- Team chat apps
- Scheduling tools
- Time Tracking apps

Ever noticed how so many of your tasks follow the same routine—and how much that routine needs standardized? That's where Standard Operating Procedures come in. They're the checklists that keep surgeries and flights safe, and can help make sure your next projects are an equal success.

Here's how.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/project-management-toolkits/.

Written by Zapier marketer Matthew Guay.

Chapter 8: Don't Overlook Standard Operating Procedures: Use These Apps to Put Them in Place

Synergy. Downsizing. Mindshare. You just rolled your eyes, didn't you?

There are few things more obnoxious than business buzzwords. And *Standard Operating Procedures* (or SOPs for short) might be the worst of them all. Namely, because most SOPs are ineffective. They're explained in clunky manuals laced with technical jargon, and they're too confusing to make anything more efficient.

But if you do SOPs right—using clear, detailed instructions based on

past experience—they can protect you from catastrophe. *Literally.*

The Great Train Wreck of 1856

On July 17th, 1856, twenty years before the telephone was invented, an excursion train taught the world why Standard Operating Procedures are needed. It left Philadelphia's Master Street Depot 23 minutes behind schedule, and the inexperienced engineer pushed the train as fast as possible to make up for lost time.

Meanwhile, another train was scheduled to run on the same line, inbound, towards Philadelphia. Both trains knew each other's schedule, and the plan was for one train to use a siding to bypass the other. That would've worked, if the second train knew of the delays—but the engineer failed to telegraph any information about the new timeline.

By the time they spotted each other, it was too late: A head-on collision occurred, leaving more than 50 dead and 100 injured.

SOPs would have helped the engineers avoid a collision. Today's

processes require prompt communication about any railroad delays, but they were far from common 160 years ago.

The Birth of SOPs

After the Great Train Wreck of 1856, public outcry prompted railroad companies to implement more standardized safety measures. Thus, Standard Operating Procedures were born. And as businesses grew from mom-and-pop shops into national outfits, SOPs became commonplace.

They realized that informal, ad hoc communication wouldn't cut it in an interconnected world. Too much got lost in translation, and avoidable accidents kept cropping up.

Companies started to write manuals filled with step-by-step guides for each important procedure. Whether an employee was scheduling a delayed train or placing an international order, the manual held every answer.

Standardizing each process helped businesses avoid disasters. But customers benefitted, too. In his book *The E Myth Revisited*, Michael Gerber finds that consumers received a more a consistent level of service thanks to SOPs.

No matter how good your product or service is, there's no faster way to lose a customer than providing an inconsistent experience.

How to Build Your Own Standard Operating Procedures

Anything that needs to be done more than twice needs to be documented.

Here's the golden rule of SOPs: Anything that needs to be done more than twice needs to be documented.

Good SOPs have the same framework, no matter what industry you work in. (The Environmental Protection Agency's Standard Operating Procedures are a great template.) Your handbook should include:

- An organizational chart
- Detailed instructions
- Checklists with measurable results

Organizational chart

No matter how small your business is, you need to create an organizational chart. Break down the different aspects of your organization, figure out who's running what, and make the chain of command obvious.

This is your chance to create accountability. The entire point of having Standard Operating Procedures is that you're able to entrust key tasks to others. It also helps your employees understand who their direct supervisor is, and where they fit in with everyone else.

Detailed instructions

SOPs are notorious for being incomprehensible masses of text (I know, it's ironic). Make sure you avoid this pitfall, otherwise no one will ever actually read and use your procedures.

There are two key ways to prevent this from happening:

1. Make sure that you have someone in-house write the procedures for your business.

Research shows that we're more likely to distrust manuals written by outsiders. And why would you entrust such an important

task to someone who doesn't understand the intricacies of your organization? If you don't write the manuals yourself, you're on the fast-track to some very expensive paperweights.

2. Ensure that you're using plain language in your SOPs.

Anyone should be able to understand your procedures. Don't assume jargon is automatically understood; take the time to explain key terms. You want to ensure that results are *systems* dependent, not *people* dependent.

Checklists with measurable results

Checklists have incredible power to reduce mistakes.

Standard Operating Procedures are essentially checklists with detailed instructions. However, you must make sure that your checklist is clear, accurate, and easy to follow.

Great checklists also produce measurable results. A recent study found that developing goal-based scenarios—tasks with stated objectives—help you reduce the learning curve of specific skills. In the early 1990s, Andersen Consulting successfully reduced the time and money spent on education and training employees for a hotel chain by introducing goal-based scenarios.

Remember that measurable results and goals are *simple* to execute and assess. A vague task like "promote article" provides no measurable results, but "tweet article to 15 influencers" gives you a set goal to achieve.

# The Tools to Build Standard Operating Procedures

Traditionally, SOPs are documented in cumbersome manuals. You could make one of those with Word and a laser printer (and watch

it gather dust), or you could use a lightweight documentation app to build a database of information.

Typically, you'll want your SOPs—along with organizational charts, instructions, and checklists—in one place. However, sometimes there's a better tool for the job, and it'll make more sense to make each on their own, perhaps with one document that brings everything together in one place.

Here are some great tools to help you build modern SOP documents:

SweetProcess
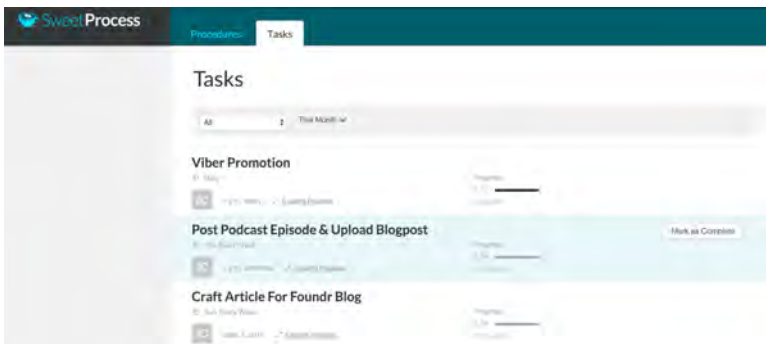
SweetProcess is specifically designed for creating Standard Operating Procedures. You can use it to create all of the documents you need for your SOP, complete with detailed instructions, photos or screenshots, and checklists.

Here's an example of Foundr Magazine's SOP in SweetProcess, detailing how to upload a new podcast episode:
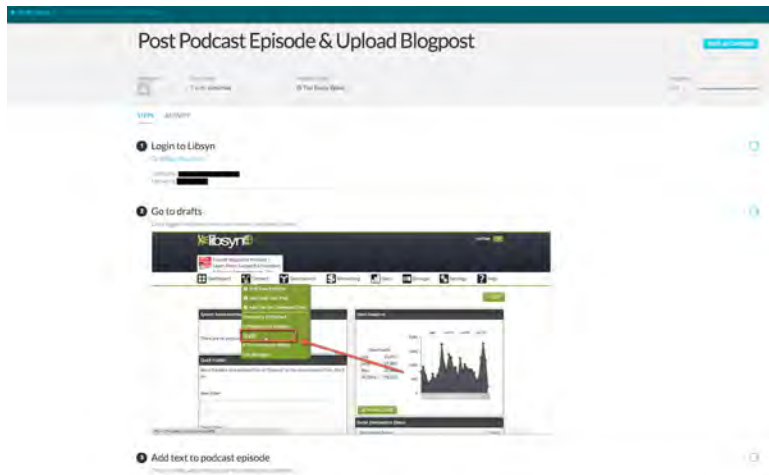
You can create detailed step-by-step checklists for each task, with images, files, and links to other team resources. From there, you can assign them to a specific team members, and set due dates, prompting SweetProcess to send you reminder emails anytime a task is close to being due.

It's a modern take on SOPs—one that your team will actually want to use. You can try it free for 14 days; after that, it'll cost $39 per month for a business plan.

Process Street
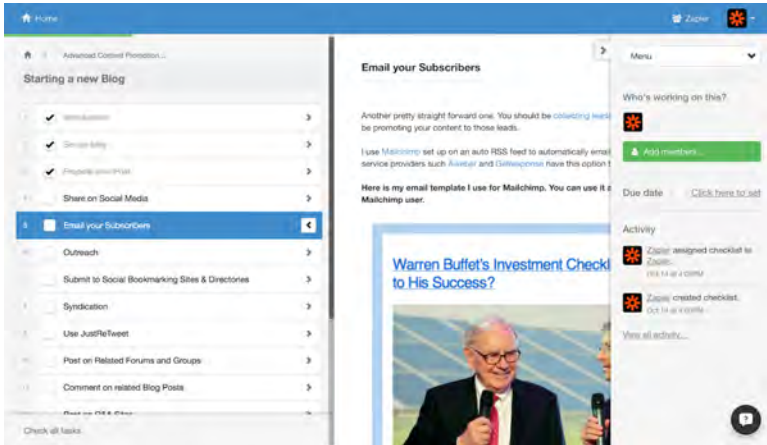
Detailed operating procedures need more than just a checklist—they need in-depth instructions with diagrams, videos, and companion files to make sure everything's understood. Process Street's checklists let you build this documentation alongside your checklists. Whenever you check off one step in your project, you'll see the next step and its companion documentation so you can dive right into the job.

Every checklist you make in Process Street is designed as a template, which you can re-create each time a process starts. Or, you can schedule workflows to automatically start on a schedule, to keep your team on track through monthly or weekly jobs. Each of those processes is organized on the Process Street dashboard so you can track how each thing is going at a glance.

Process Street is free to get started using—you can build unlimited checklists and share them with your entire team for free. Then, for $5/month per user, you'll get advanced permissions, API access, versioning, reports and more—everything you need to make your checklists a part of your business workflow.

See Process Street integrations on Zapier

Pipefy
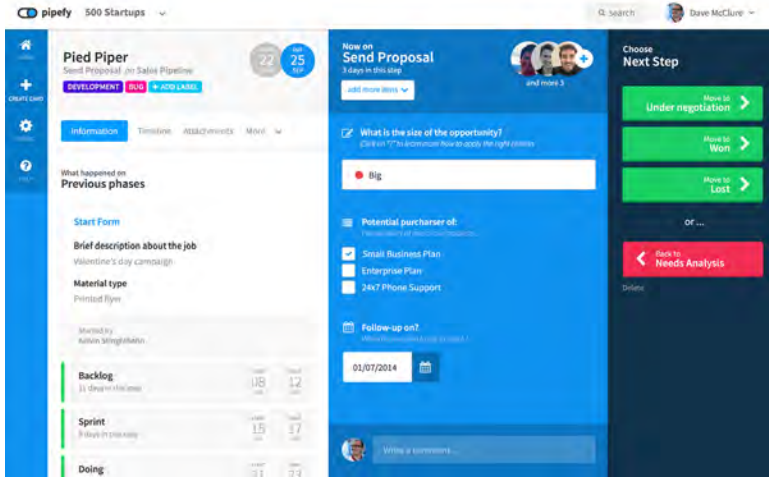
Have complex projects that need different steps depending on how they turn out? Pipefy's workflows can be a great way to make flexible standard operating procedures for any type of process. Each checklist shows "Next Steps" once its finished, to choose how the project will proceed, and you'll get see the next checklist for that route.

And, if you're not sure where to start with making such detailed workflows, Pipefy includes process templates for dozens of popular projects and workflows that you can adopt for your own needs.

Pipefy is free for up to 100 cards, then starts at $5/month per user for creating your own processes with integrations and API access.

Pipefy's Zapier integration is coming soon.

Hackpad
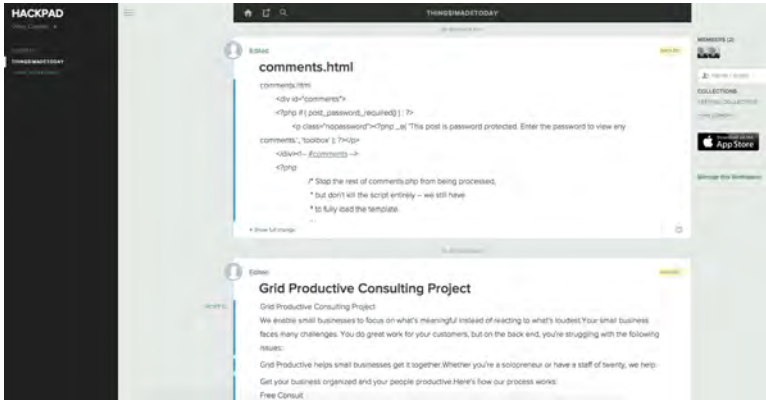
[Hackpad](#) mixes a notes app with a wiki, forming a place to store interconnected documents. You'll write notes in plain text, and use simple formatting to keep everything looking consistent. Drag in images and write a few checklists, and you'll have everything in one place.

Hackpad uses tag-like collections to group related documents, and you can link pads together via hashtag-based references. That way, you can write documentation once and link to it later.

See [Hackpad integrations](#) on Zapier.

Evernote
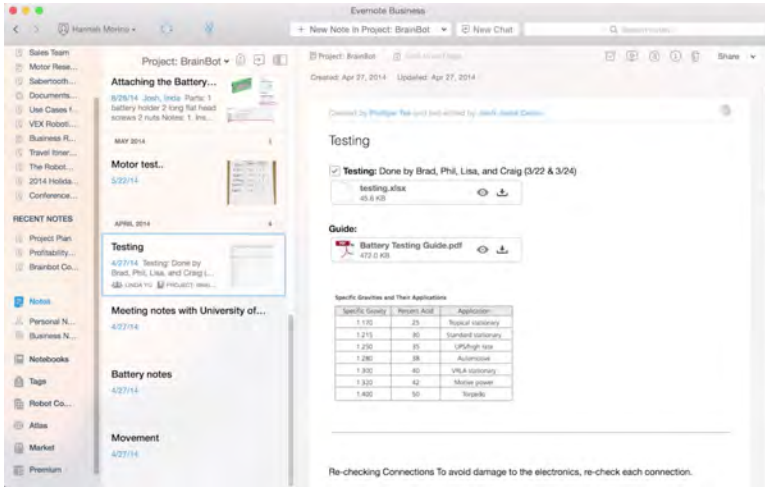
The popular note-taking app Evernote also makes a solid repository for your SOPs. Using notes, you can write up your instructions, create checklists, and drag in your organizational structure diagram.

Then, you can organize those notes into notebooks that can be shared with the whole team. Looking for more collaboration options? Evernote also includes team chat, so you can discuss your work right alongside your SOP documents.

Evernote offers apps for most devices, along with a web app, so your team can see the SOPs anywhere. And if anything gets changed, you can jump back to previous versions to see if anything important was lost.

See Evernote integrations on Zapier.

Wunderlist
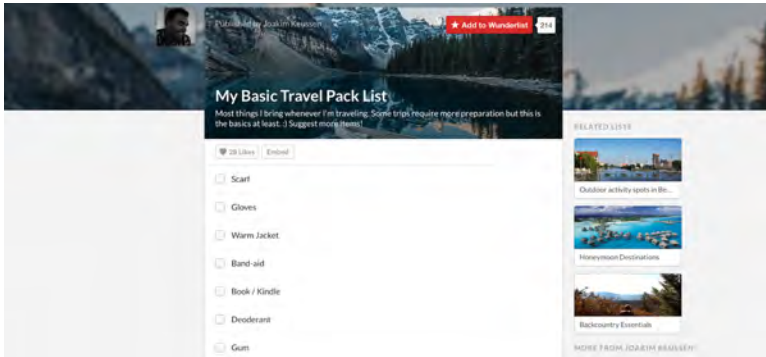
[Wunderlist](#) is a free [to-do list app](#) that works on almost any device, and is incredibly easy to use. You can create a checklist for tasks, then further break them down with detailed sub-tasks and notes.

Wunderlist works well for SOPs because you're able to create public lists that you can share with teammates. You can leverage those collaborative features to assign tasks, log to-dos as a team, and keep everyone in-sync.

Wunderlist isn't a full SOP tool, but it's a polished solution for the checklists portion.

See [Wunderlist integrations](#) on Zapier

WorkFlowy
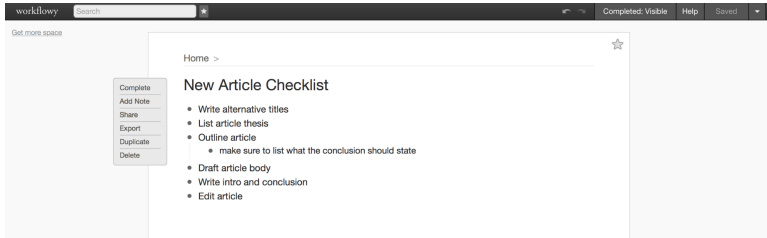
WorkFlowy can help you create a basic set of SOPs around check-lists. Much like Wunderlist, it's free, available on virtually every platform, and offers some powerful collaboration features.

Unlike Wunderlist, though, WorkFlowy lists everything on a single page in bullet-point form. It's easy to create and organize these lists and sub-lists, but the text-based nature of the app can cause some communication issues. For example, images aren't WorkFlowy's strong suit, so more detailed SOPs might break down in this format.

Trello
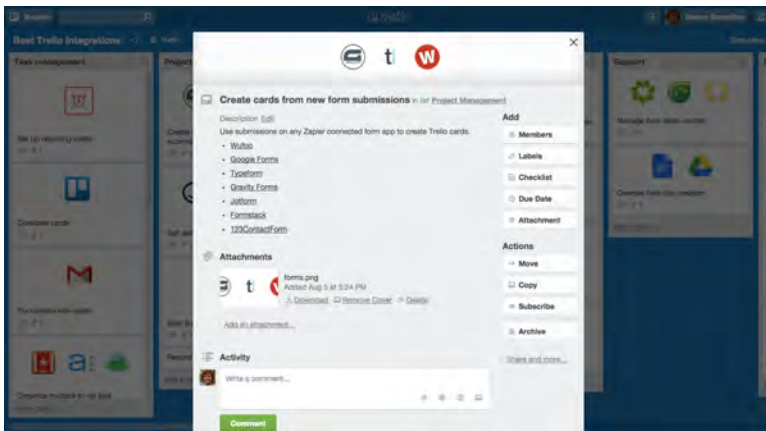
Primarily used as a project management tool, Trello can also be used as a tool for documenting procedures. For every task you have, you can create a new card, and then write detailed instructions in the form of checklists and notes.

Trello lets you attach files to cards, use comments to discuss how the tasks are progressing, and move items through your processes with a drag-and-drop interface.

Best of all, it's free for almost everything your team would need.

See Trello integrations on Zapier

Help your team get more out of Trello with our roundup of Trello tricks, automations, workflows and more.

Preempting Problems with SOPs

Standard Operating Procedures really come down to one thing: **consistency**.

Every growing business should be documenting the most complete SOPs possible, so your processes can scale with your team. Without them, you risk of providing inconsistent service and cleaning up your own train wrecks.

Start with the right tools, detail the processes you use every day, and you'll be on your way to a collection of foolproof SOPs.

You've got your team's projects under control, with consistent results thanks to standard operating procedures and checklists. But what about your personal projects, those tasks at home that keep piling up or the freelance gig you've recently taken on?

Those need a project management system too—perhaps the same
one you're using for your day job. In the last chapter, we'll look at
how to use a project management app for personal projects.

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*Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-
guide-to-project-management/standard-operating-procedures/.*

Written by freelance writer Jonathan Chan.

Image credits: *Header photo courtesy of Michael Havens on Flickr.
Artist's impression of The Great Train Wreck of 1856 courtesy Frank
Leslie's Illustrated Newspaper.*

Chapter 9: How to Manage your Personal Tasks with a Project Management App

When Mike Chan tried to convince his wife, Vicky, to set up a Trello board for their personal life, she was a bit skeptical at first. "You're gonna make me sign up for another thing?" she asked.

As CMO of Thorn Technologies and host of the Go and Grow Podcast, Chan was already using kanban project management app Trello to manage his work. He wanted to bring that kind of organization to the rest of his life.

"We were just doing things over text messaging and email," Chan says. "There wasn't enough collaboration with those tools, and a lot of our conversations weren't documented." Thus, the "Mike and Vicky Life Stuff" Trello board was born.

Project management apps are the default choice for work teams, as they break complex projects down into achievable goals. But you have personal projects, too: redecorating the house, planning a vacation to Bangkok, mapping out a dinner party, or whatever your next adventure is. You don't stop being productive when we leave work.

To-do list apps can help you tackle those tasks, but a full-featured project management app gives you the flexibility to manage smaller, low-hanging fruit **and** long-term, multi-layered projects.

Putting everything in one place helps you coordinate your life and accomplish the things that *need* to get done so you have more time for the passion projects that really matter to you. Here's how you can start using project management apps for life management.

Why Use a Project Management App?

To-do list apps can be great for checking off simple tasks. When you're dealing with more complex projects that have a lot of moving parts and require more collaboration, asset storage and reporting, you might want something more robust. Project management apps may be designed for companies with large teams, but they can also work for personal projects—and are often free for a couple projects and collaborators.

Chan was drawn to Trello versus a task management app because of the team-focused features. "The messaging is very helpful if you're collaborating with a team and need to have that interaction about tasks and projects," Chan says. "You can link everything to a task and have a conversation within that card in Trello and have a paper trail of everything that you referred to."

Trello helps break projects down into tasks lists

Eddie Park, assistant executive pastor at EvFree Fullerton Church in Fullerton, California, relies on Evernote for both his work and personal life. But when it came to the intern program at his church, he wanted something a little different, so he turned to Trello. Park creates a Trello board for each intern, where he stores paperwork, articles, activities and tasks. He also asks interns to post information about themselves—like their Myers–Briggs personality type and photos of themselves—to help Eddie get to know them as people.

"The Trello boards are a one-stop-shop for each intern I work with," Park says. "It's super helpful because it gives me a bird's-eye view of who this person is and what they're working on."

Park then carried Trello over into his personal life, where he now has a board with his wife. They each have a to-do list for tasks and reminders, and also post encouraging notes for one another.

Think about it this way: to-do apps help you tick off day-to-day tasks, but project management apps are about long-term goals. They're a repository for your research, blueprints, and "someday" ideas. And if you want to pull a coconspirator into your project, PM apps are flexible enough to work for "us" instead of just "me".

Choose a Project Management App

There are a lot of factors to consider when choosing a project management tool, whether it's just for yourself or a group.

But you main consideration should be finding an app that works for your workflow. A tool that magically cures one team's organizational woes might end up making you wish you never hit the "sign up" button. That's ok—every project carries different requirements.

Emily Stewart had to use different apps before she found the right one. To help manage the precious free time she spent building her side-project Compeer—an iOS app that lets people rate the ADA-friendliness of locations—Stewart and her co-creator first used Basecamp.

"It worked well for storing assets, conversations and big ideas for later," Stewart says. "You can say, 'What was that thing we kind of talked about and put on hold?' and search for it."

It worked great—until it didn't. As development progressed, Stewart noticed they weren't using Basecamp as much as before. "We noticed things that had been done weren't getting checked off," she says. "If you find yourself not using something, you might be wasting effort on a tool that isn't working for you."

Because they only had nights and weekends to work on the app, they needed a tool that would maximize productivity. What they really needed was something that could better track feature requests and integrate with Github. They tried Pivotal Tracker until a friend suggested Waffle, which they're currently using.
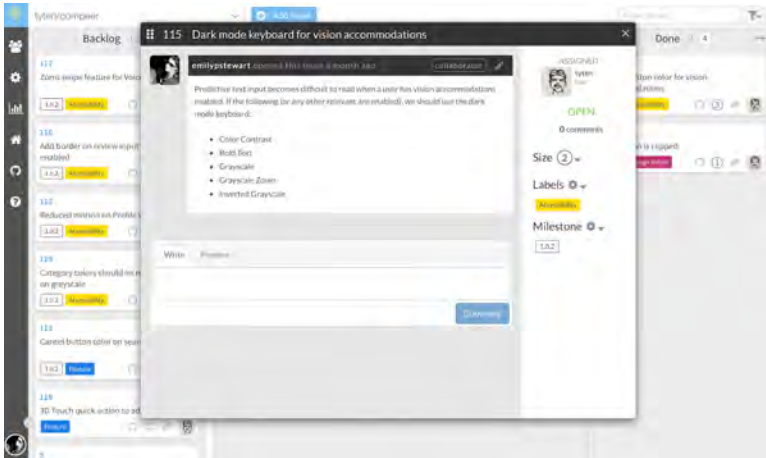
Waffle helps you see which Github issues to focus on next

"When you have a backlog, and you're trying to move one thing over at a time, having that linear left-to-right visual is really helpful," Stewart says. "We needed to know status and where something was in the pipeline."

Chan, who was an Asana user before switching to Trello, says a big consideration for him was the user interface. "I think the first thing to consider is what you're comfortable looking at," he says. "There are so many options out there, you can get pretty nitpicky. If one doesn't feel too good, there's gonna be something out there you are comfortable with."

Fiona Silke—a sustainability consultant and co-founder of Loop & Co—most recently tried LiquidPlanner and Trello.

"Most of my projects—for better or worse—have moving deadlines, and most steps in the process are reliant on the previous step to be completed," she says. "Trello helps me look longer term to map out what needs to be done. I also use Trello to capture tasks that I think of during one phase of the project but that don't need to be done until another later phase."

Don't be afraid to shop around until you find an app that feels

right. Working on personal projects should be fun, and your project management tool should reflect that. Don't force yourself to use an app that's not up to snuff.

Create a Productivity Workflow

Once you've settled on a tool, you've got to make sure you're using it effectively. You likely won't need all of its features, as your "team" may just be yourself or a handful of people. But you'll still need a way to effectively manage your tasks and get them completed.

Here are a few tips for getting the most out of your new project management app:

Follow a Project Management System
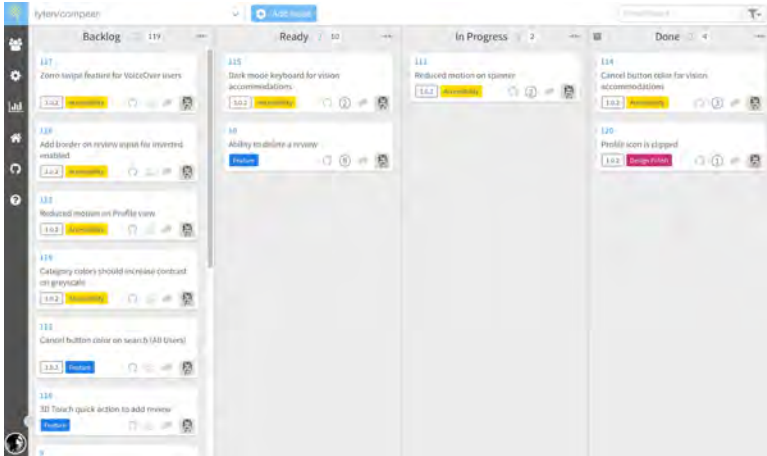
Color coded tasks makes it easy to know where projects stand

The problem with plain to-do lists is that they don't give any structure to your tasks. That's what a project management system

offers—it helps you create a workflow to know what you need to work on next.

There are a lot of project management methods to choose from: waterfall, lean, scrum, kanban, and more. Each have their own strengths and weaknesses. (And yeah, they have weird names, but they get real results.)

Stewart and her co-creator decided to use Agile's scoring method to estimate how much effort tasks will take to complete. "We assign points to features, so we're able to see that this pull request is worth this many points," she says. "The point system is helpful because it's motivating."

Silke uses color-coding to quickly understand where her projects stand. "Red means urgent, green means completed," she says. "This helps me and others know where we are all at."

Park, who follows the Getting Things Done method, likens finding a method or system to eating: "When it comes to dieting, I've done Paleo, I've done Whole30, I've counted macros," he says. "When I'm doing it, I can go for a little while, like 60 days, and I do really well, but it's not a long-term solution. You wanna find something that can be a lifestyle."

Project management apps are all about planning, and mapping out a system before you get started will help you stay on track. You'll know which tasks are up next—whether it's mocking up a page or sending out dinner party invites—and which ones are the most time-sensitive.

Make Sure Tasks Are Doable

Break large tasks down into steps

Creating tasks that are actionable is an important part of any project management system. It's all about deciding on a direction: you need to pick a point to focus on if you want to nail your target. Define the task clearly, and it will be that much easier to complete.

"When a task is too narrow, it's hard to see how this one little thing is going to affect other cards later down the road," Stewart says. "Or if it's too vague, it can be really hard to get started."

Waffle's Agile scoring feature allows Stewart to estimate how big a task is and make work more manageable. "If a card is an 11 or some other high number, you'd say, OK maybe we split that card up so it's not so big."

For the Go and Grow Podcast, Chan coordinates production with his production manager through Trello, creating clear, actionable tasks that outline the making of an episode from start to finish. "There are 27 steps to create a podcast," he says. "We use the checklist and commenting features extensively to make sure we're on top of the workflow to create an episode. We use cards to come

up with the order and make sure everything is in line."

Set up Integrations

Integrations can help reduce cognitive workload, allowing you to keep everything in one place rather than separately checking and updating a bunch of apps and tools.

That's what Silke loves about her LiquidPlanner calendar integrations. "I find that I don't constantly check to-do lists," Silke says. "I do, however, check my calendar all the time, so I run my immediate daily life through my calendar."

Chan saves time by automating repetitive tasks. He uses automation app Zapier to create repeating tasks in Trello, so he doesn't have to add them manually himself each week.

Zapier Integration:

- Create Trello card weekly at scheduled time

Stewart uses Waffle's Github integration to attach code to specific cards or tasks in Waffle. "In Github, you'd say 'Hey this chunk of code is related to this card,'" she says. "It helps keep things moving along because you don't have to have as many conversations."

It's been a few months, and Trello stuck for Mike Chan and his wife's personal tasks—and it's especially handy because Chan and his wife are planning a big move. "We're organizing everything there, like the things we need to do to rent out our condo and all the documents and the ridiculous amount of paperwork that comes with that," Chan says.

"It's been really good. My wife found it was worth signing up for one more thing."

Whether you're looking to get on the same page as your spouse or tackle some bucket list items, using a project management app for life management and personal projects can help you avoid feeling overwhelmed or letting things slip through the cracks.

Finding the right tool and using it effectively can help you stay organized, meet your goals faster, and improve communication with the different people you collaborate with.

Enjoy this chapter? Read it online or share it at https://zapier.com/learn/ultimate-guide-to-project-management/personal-project-management-app/.

Written by freelance writer Genevieve Conti.

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Extra Resources from Zapier

Project management is a never ending task. Whether you're planning personal projects, or designing the next Mars lander with your team, there's always another project to tackle, another task to check off, another new idea that's begging to be explored. You'll manage more projectsâ€"and create more great things.

This book has given you the tools you need to manage any size of project, and make sure your projects consistently produce great results. But what about the rest of your work? You'll need great tools for every other aspect of your work, things to help you manage your contacts and forms and marketing and more.

Zapier's got the resources for you, with free Learning Center books, blog posts, and more. Here's the best resources to help with every other part of your work:

- *The Ultimate Guide to CRM Apps* for an in-depth look at contact management
- *The Ultimate Guide to Email Marketing* to learn how to reach out to customers with automated emails better
- *The Ultimate Guide to Forms and Surveys* to gather data from your users and learn from their input
- *The Ultimate Guide to Customer Support* to solve your customers' problems and empower them to do more with your products
- *The Ultimate Guide to Remote Work* to learn how to grow and manage a team around the world

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One more thing: if you enjoyed this book, we'd really appreciate it if you could rate it on the Kindle Store. Thanks!

We hope you enjoyed this book!

∼ *The Zapier Team*