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COURSE 2 : Project Initiation: Starting a Successful Project

Week 1 : Fundamentals of Project Initiation

Learning Objectives

- Explain the Project Management Certificate program structure and course functionality.
- Explain the significance of the initiation phase.
- Describe the key components of the initiation phase.
- Determine a project's benefits and costs.

1.1 Getting Started With The Course

1.1.1 Introduction to Course 2

- Initiating the project
- Identifying project scope, goals, and deliverables
- Measure the success of a project
- Identifying stakeholders
- Scoping project tools and resources

1.1.2 Course 2 overview

This course will teach you how to set the stage for a successful project. You will learn about stakeholders, their level of influence, and how to mobilize and manage them, as well as tackle tasks to identify project scope, goals, deliverables, and success criteria. You will learn how to use tools like RACI (Responsible, Accountable, Consulted, and Informed) charts, stakeholder analysis, and project charters to help you set project expectations. You will also familiarize yourself with setting SMART (Specific, Measurable, Attainable, Relevant, and Time-bound) goals to help you see the full scope of a project, determine its feasibility, and clearly define what project success will look like in concrete terms. Current Google project managers will continue to instruct and provide you with hands-on approaches for accomplishing these tasks, while implementing the right tools and resources for the job.

1.2 Understanding The Key Components of Project Initiation

1.2.1 Why is project initiation essential?

Initiation is the first phase within the project life cycle, followed by planning, executing, and closing. Because initiation is the first phase of the project, it's really **important to get it right**. A **well-planned initiation results** in a **strong foundation** for your project, and sets it up for **success**.

Initiation begins after a problem or opportunity has been identified within an organization. Often, **stakeholders** like senior leaders at a company **will initiate a project** to address a specific need for the business. **For example**, perhaps the company would like to roll out a new product, improve employee well being, or reduce costs in a certain department. It's your responsibility as the project manager to help **identify the project goals, resources, and other details based on initial discussions with the project stakeholders**. Even though someone else might come up with an idea for the project, it's still your job to figure out all the important pieces that need to come together in order to get the work done.

The initiation phase is a **crucial time for asking stakeholders the right questions, performing research, determining resources, and clearly documenting the key components** of a project. Doing this will help you solidify the scope, or the boundary, of the project.

If the project **isn't initiated properly**, things can **go wrong** pretty fast. For example:

- without sufficient understanding of the project's goals, you might underestimate what resources you need or how long the project might take.
- without agreeing with stakeholders on what success looks like, you might think the project was completed successfully, while the stakeholders might think it didn't accomplish their goals.

Getting on the same page and gaining clarity during the initiation phase can save a lot of time and extra work for everyone throughout the project. **Proper initiation** also helps **ensure** that the **benefits of the project outcomes will outweigh the costs** of the project. To determine this, you'll do what's called a **cost benefit analysis**, which is **the process of adding up the expected value of a project (the benefits) and comparing them to the dollar costs**. To do this, you will work with stakeholders to consider a few questions.

To determine the **benefits** of a project, those questions might include:

- What value will this project create?
- How much money could this project save our organization?
- How much money will it bring in from existing customers?
- How much time will be saved? How will the user experience be improved?

And to determine the **costs** of the project, those questions might include:

- How much time will people have to spend on this project?

- What will be the one-time costs?
- Are there any ongoing costs?
- What about long-term costs?

The **benefits** of a project **should always outweigh the costs**, so it's really important that you consider these questions early on.

1.2.2 Key components of project initiation

There are several **key components of initiation** that you need to consider in order for your project to be successful:

- goals
- scope
- deliverables
- success criteria
- stakeholders
- resources

First you need to consider the **goals** of the project, **the goal is what you've been asked to do and what you're trying to achieve**. All projects **should have clear goals** and often those will be **determined by senior company leaders**, with your help. From there, you will begin to consider the project **scope**. This is **the process to define the work that needs to happen to complete** the project.

You also need to think about project **deliverables**. They're the **products and services** that **you will create for your customer, client or project sponsor**. Deliverables can be anything from product features and functionalities to documentation, processes and more, **anything that enables the goal of your project to be achieved**. Deliverables are submitted to help you reach your project goals. Also, it's important to keep in mind that the **deliverables can be tangible or intangible**. An example of a tangible deliverable might be submitting a chapter of a manuscript. If the goal is to publish a textbook. Or if your project goal is to finish implementation of a new point of sale software at a retail store, scheduling staff training sessions could be an intangible deliverable.

Once the goals, scope and deliverables are determined, you need to consider **success criteria**. Success criteria are the **standards by which you measure how successful a project** was in reaching its goals.

Another important consideration is your **stakeholders**. Stakeholders are key to making informed decisions at every step of the project, including the initiation phase. They're the **people who both have an interest in and are affected by the completion and success of a project**. As a result, they're often instrumental in determining the goals, objectives, deliverables and success criteria of the project, from coming up with the idea to outlining the expectations of its results. As you move through the initiation phase, it's your job to **ensure that you understand the needs of the project stakeholders early on**. It's also your role to **ensure that all stakeholders are in agreement on the goals** and overall mission of the project before moving on to the next phase.

Resources generally refer to the **budget, people, materials, and other items** that you will have at your disposal. It's super important to think carefully about these pieces early on. No one wants to get started on a project, only to realize halfway through that they don't have enough money or enough people to complete the work. That would be a mess.

Finally, once you've established your goals, scope, deliverables, success criteria, stakeholders, and resources, it's time to create a **project charter**. A project charter is a **document that contains all the details of the project**. Project charters clearly **define the project and its goals and outline what is needed to accomplish them**. A project charter allows you to **get organized**, set up a framework for what needs to be done and communicate those details to others. Once you've drafted the charter, you would then review the document with key stakeholders to get their approval to move into the planning stage.

1.2.3 Reflection: Project initiation and key components

Start by reading the scenario:

Imagine you are a project manager at an educational software company. You're assigned a new project to develop a digital grading platform for a local high school. Before beginning the project, you meet with teachers, school administrators, the school IT department, and the district superintendent to discuss the project and get their input.

During these meetings, you organized your thoughts by writing down project key components that the stakeholders have requested. Your notes on the key components are:

- \$150,000 maximum budget
- Team: can add one member from the school IT department
- Platform should allow teachers to enter grades and allow students/parents to view grades
- Need full teacher buy-in at high school: 100% adoption within next nine months
- Project should focus only on the digital grading platform and NOT impact other digital platforms (ex. attendance, school lunch payments)
- Overall, the school is seeking a platform for digital grading

The next step in the project is to organize the key components into a project charter. You will then present the charter to the individuals involved with the project. The project charter ensures everyone is aligned before planning and then executing the project.

1. Which of the key components is the project's goal? Write one sentence.

To launch a digital grading platform for the high school and get full teacher adoption.

2. Which key component outlines the project's scope? Write one sentence.

Creating the digital grading platform and not updating other digital platforms the school uses such as attendance or meal payments.

3. Which key component is the project deliverable? Write one sentence.

A platform for teachers to enter grades and students to view their grades.

- 4. Which key component outlines the project's success criteria? Write one sentence.**

100% of teachers adopt the digital grading platform within the next nine months

- 5. Who are the project stakeholders? Write one sentence.**

teachers, students, parents, school administrators, school IT department, and the district superintendent.

- 6. Which key components outline the resources you will have at your disposal for the project?**

In the scenario, it's the budget of \$150,000 and the member from the school's IT department.

1.2.4 Explore: Project Initiation

Vinh works as an event producer at Formation, which is a tech company with 200 employees. He's working on a project to plan the company's annual employee conference. Let's explore how Vinh initiates the project.

Establish project goals

The theme for this year's event is "community," so that Formation's teams can come together and develop stronger collaborative skills. Vinh talks to senior leadership and they agree that the event will span three days and accommodate participatory workshops for the company's 200 global employees.

Create the scope

The stakeholders told Vinh that they would like to hold small-group discussions, team training sessions, and a karaoke cocktail party—and provide transportation to/from all events. Vinh researches venues, vendors, and technology providers to ensure he has a sense of costs and logistical needs so he can define the scope.

Provide deliverables

From the project plan, which itself was an early deliverable, Vinh has a clear set of deliverables he needs to provide throughout the conference, including event registration, a full schedule of events, and meal service.

Define success criteria

The goal of the conference is to connect employees. To measure that, Vinh wants to know how many participants learned something or made a new connection. He plans to send a satisfaction survey to gather direct employee feedback. He also arranges to promote the survey on posters at the event and in post-conference emails.

1.2.5 Performing a cost-benefit analysis

Previously, you learned that a **cost-benefit analysis** is the process of adding up the expected value of a project—the benefits—and comparing them to the dollar costs. In this reading, we will discuss the benefits of conducting a cost-benefit analysis, guiding questions to help you and your stakeholders conduct one, and how to calculate return on investment (ROI).

The benefits of a cost-benefit analysis

A cost-benefit analysis can minimize risks and maximize gains for projects and organizations. It can help you communicate clearly with stakeholders and executives and keep your project on track. Because this type of analysis uses objective data, it can help reduce biases and keep stakeholder self-interest from influencing decisions.

Comparing a project's benefits to its costs can help you make a strong business case to stakeholders and leadership and ensure your organization pursues the most profitable or useful projects. Organizations use cost-benefit analyses to reduce waste and invest their resources responsibly.

Guiding questions for a cost-benefit analysis

When you're pursuing a project, the benefits should outweigh the costs. It's important for you and your stakeholders to consider questions like the ones that follow early on, while you prepare the proposal.

To determine the benefits of a project, you might ask:

- What value will this project create?
- How much money could this project save our organization?
- How much money will it bring in from existing customers?
- How much time will it save?
- How will it improve the customer experience?

And to determine the costs of a project, consider questions such as:

- How much time will people have to spend on this project?
- What are the one-time costs?
- Are there any ongoing costs?
- What about long-term costs?

You might also consider questions about **intangible benefits**. These are gains that are not quantifiable, such as:

- **Customer satisfaction.** Will the project increase customer retention, causing them to spend more on the company's products or services?
- **Employee satisfaction.** Is the project likely to improve employee morale, reducing turnover?
- **Employee productivity.** Will the project reduce employee's overtime hours, saving the company money?

- **Brand perception.** Is the project likely to improve the company's brand perception and recognition, attracting more customers or providing a competitive advantage?

You can also flip these questions to consider **intangible costs**. These are costs that are not quantifiable. For example, might the project put customer retention, employee satisfaction, or brand perception at risk?

When assigning values to tangible or intangible costs and benefits, you can reference similar past projects, conduct industry research, or consult with experts.

Calculating costs and benefits

The process of calculating costs and benefits is also called calculating **return on investment**, or **ROI**. There are many ways to determine a project's ROI, but the easiest way is to compare the upfront and ongoing costs to its benefits over time.

One common ROI formula is:

$$(G-C) \div C = ROI$$

In this formula, **G** represents the financial gains you expect from the project, and **C** represents the upfront and ongoing costs of your investment in the project.

For example, imagine your project costs \$6,000 up front plus \$25 per month for 12 months. This equals \$300 per year, but you estimate that the project will bring in \$10,000 in revenue over the course of that year. Using the formula above, you calculate the ROI as: $(\$10,000 - \$6,300) \div \$6,300 = 0.58 = 58\%$

The ROI comes to 0.58, or 58%. You consider this to be a strong ROI, so you decide to pursue the project.

Key takeaway

Performing a cost-benefit analysis can help you and your stakeholders determine if it makes sense to take on a new project by evaluating if its benefits outweigh its costs. When conducting cost-benefit analyses for your prospective projects, you can use the guiding questions and ROI formula provided in this reading as a reference.

To learn more about performing a cost-benefit analysis, check out these articles:

- [Cost Benefit Analysis for Projects – A Step-by-Step Guide](#)
- [Cost Benefit or Benefit Cost Analysis](#)

Weekly Challenge 1

1. In the initiation phase, a project manager performs research, consults with stakeholders, and clearly documents key project components. What does going through this process help them solidify?

- Project scope
- Project delivery dates
- Project tasks
- Project closeouts

 **Correct**

2. What two questions can a project manager ask to determine a project's *costs*? Select all that apply.

- What value will the project create?
- What are the ongoing project costs?

 **Correct**

- How will the user experience be improved?
- How much time will people have to spend on the project?

 **Correct**

3. What key component in the project management cycle is a meeting scheduled with staff to train on a new product?

-
- Scope
- Success Criteria
- Resource
- Deliverable

 **Correct**

4. As a project manager, you meet with stakeholders to set what products and services you will complete for the project. Which project initiation component are you trying to determine?

- Resources
- Success criteria
- Scope
- Deliverables

 **Correct**

5. As a project manager, you meet with the owners to discuss what outcomes they would like to achieve in the project. What project initiation component are you trying to determine?

- Goals
- Resources
- Budget
- Scope

 **Correct**

6. What is the purpose of a project charter?

- Defines the project and its goals and outline what is needed to accomplish them
- Determines project roles and assign associated tasks
- Establishes communication channels and record preferred methods
- Outlines how to mitigate potential risks

 **Correct**

7. Which of the following could be considered intangible benefits? Select all that apply.

- Income earned
- Brand perception

 **Correct**

- Employee satisfaction

 **Correct**

- Customer satisfaction

 **Correct**

8. You expect that a project will bring in \$22,000 USD in revenue per year. You estimate it will cost \$10,000 up front. You also estimate costs of \$200 per month for the first 12 months, which equals \$2,400 per year. Using the formula $(G-C) \div C = ROI$, how would you calculate the project's return on investment (ROI) after the first 12 months?

- $(22,000 - 12,400) \div 22,000 = 25\%$
- $(12,400 - 10,000) \div 22,000 = 8\%$
- $(15,000 - 10,000) \div 12,400 = 45\%$
- $(22,000 - 12,400) \div 12,400 = 77\%$

 **Correct**

Week 2 : Defining Project Goals, Scope, and Success Criteria

Learning Objectives

- Define and create measurable project goals and deliverables.
- Define project scope and differentiate among tasks that are in-scope and out-of-scope.
- Explain how to manage scope creep to avoid impacting project goals
- Define and measure a project's success criteria.

2.1 Identifying Project Goals

2.1.1 Introduction

Before we get started, I'd like to talk through an example that we'll follow for the rest of this course. Imagine that you're the lead project manager at Office Green, a commercial landscaping company that specializes in plant decor for offices and other businesses. The Director of Product at Office Green has an idea for a new service called Plant Pals to offer high-volume customers small, low-maintenance plants, like little cacti and leafy ferns, for their desks.

As the project manager, you've been tasked with managing the roll out of this new service. As we go through this course, we'll return to your role as the project manager at Office Green, to help teach you about project goals, deliverables, and success criteria. You'll also see the role your team and stakeholders play in creating and following these three important components. At the end, you'll compile everything you've learned into a shared document that you can use as a portfolio to share with future employers.

2.1.2 Determining project goals and deliverables

Determining project goals

The **project goal** is the **desired outcome of the project**. It's **what you've been asked to do** and **what you're trying to achieve**. For example, your goal could be to improve the response time to customer inquiries via email by 20 percent. The goal of your Office Green project might be to increase revenue by five percent through a new service called Plant Pals that offers desk plants to top customers by the end of the year.

Goals are **important** because they **give you a roadmap to your destination**. Without a clear goal in mind, how can you know where to go or how to get there? Now, one of the biggest **differences** between what makes a **good goal** and a **not-so-good goal** is **how well it's defined**. Meaning: **how clear and specific is the goal**. If the goal is your destination, are you confident you'll know when you've arrived?

The examples I mentioned before, to improve the response time to customer inquiries via email by 20 percent, and to increase the Office Green revenue by five percent are two

well-defined goals because they tell you what you're trying to achieve. These goals also tell you how to do what you've been asked to do. In this case, it's via email and through a new service offering, and that's not all. These goals clarify the goal even further by saying "to improve by 20 percent and increase by five percent."

Well-defined goals are both specific and measurable. They give you a **clear sense of what you are trying to accomplish.** When you start a project, **take time to review your goals** and **make sure they're well-defined.** To do this, you might need to **get more information from your stakeholders.** Talk to them about their vision for the project. Ask how this aligns to the company's larger goals and mission. By the end of that conversation, you and your stakeholders should agree to support the project goals in order to avoid running into issues later on.

Make sure that before you start your project, you, your stakeholders, and your team are all clear on the project goals so that you know you're making the right kind of progress.

Determining project deliverables

Once you have the goals nailed down, it's time to examine the project deliverables. **Project deliverables** are the **products or services that are created** for the customer, client, or project sponsor. In other words, a deliverable is **what gets produced or presented at the end** of a task, event, or process. Take the goal to improve customer response time. The deliverable for that goal could be the creation of email templates for responding to typical questions.

Your Office Green project goal to increase revenues could have these two deliverables: launching the plant service and a finished website that highlights the new kinds of plants being offered. These are considered deliverables because they **describe tangible outputs** that show stakeholders how additional revenues will be generated.

There are all sorts of project deliverable examples. A pretty common one is **a report.** When a goal is reached, you can visibly see the results documented in the chart, graph, or presentation. **Deliverables help us quantify and realize the impact** of the project. Just like needing well-defined goals, you need well-defined deliverables for pretty much the same reasons. Deliverables are usually **decided upfront with the stakeholders** or clients involved in the project. They hold everyone accountable and are typically a big part of achieving the goal. Make sure to ask questions about what the deliverable should be and have everyone share their vision and expectations of the deliverables so that you're all on the same page.

2.1.3 Explore: Project Plant Pals: Initiation

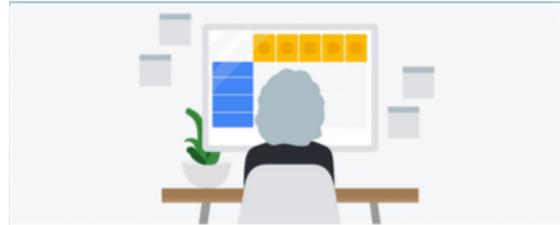
In upcoming activities, you will work with stakeholders to set goals, roles, and deliverables for Project Plant Pals. Explore an infographic to find out more about what's next in the initiation phase.



Refine goals with stakeholders

First, you will meet with the Director of Product (the project sponsor) to discuss their aims for the project. To clarify these goals and keep the project on track, you'll turn them into SMART goals.

GOT IT



Assign roles and responsibilities to promote the service

To promote Plant Pals, you'll assemble teams to plan the marketing and sales strategy and redesign the website. You'll use RACI charts to determine who should be responsible, accountable, consulted, and informed about various project tasks.

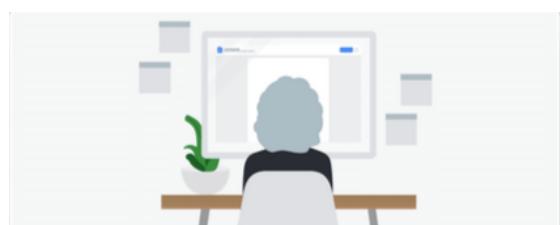
GOT IT



Assess stakeholder power and influence

Next, you'll get to know some of your stakeholders and find out how they fit into the project. A stakeholder analysis and power grid will help you decide how best—and how often—to communicate with team members, investors, and more.

GOT IT



Create a charter for the next stage of the project

As you wrap up the initiation phase, your focus will shift to internal operations. You'll create a project charter to guide your team as they plan training, fulfillment, and delivery procedures for Plant Pals.

GOT IT

2.1.4 How to set SMART goals

As an entry-level project manager, you may or may not be setting the project's main goals, but you will need to be able to identify and clarify them as needed, and that's where the **SMART method can be a valuable tool**.

Spesific

If your goal is not specific, you'll have trouble figuring out how long it should take to complete and whether or not you've accomplished it. For example, if the goal is simply to improve customer service response time, that's not very specific. It does tell you what you want to achieve in general, but it doesn't say anything else. If you improve response time by one percent, is that enough? If after five years response time finally goes up, is that enough? How about if only half of your staff improves their response times, but the other half stays the same.

Specific goals should answer at least two of the questions I'm about to ask.

- What do I want to accomplish?
- Why is this a goal? Does it have a specific reason, purpose, or benefit?

- Who is involved? Who is the recipient? Employees, customers, the community at large?
- Where should the goal be delivered?
- To what degree? In other words, what are the requirements and constraints?

Measurable

Next, we want to set goals that are **measurable**, meaning we can **determine that they were objectively met**. Measuring is not only a way for people to **track progress**, but also a tool to help **people stay motivated**. You can tell the **goal is measurable** by asking **how much, how many, and how will I know when it's accomplished?** Sometimes the success of a goal can be measured with **a simple yes or no**. Did you learn to play the guitar, yes or no?

You will need to **measure most of the goals** you have with **metrics**. Metrics, **what you use to measure something like numbers or figures**. **For example**, if your goal was to run a five kilometer race, then distance in kilometers is your metric. At Office Green, the project goal is to increase revenue by five percent. In this case, revenue is the metric. Lastly, consider **benchmarks or points of reference** to **make sure** you're choosing **accurate metrics**. For instance, if your overall goal is to increase revenue, you can look at last year's data as a benchmark for deciding how much to increase revenue this year. If last year's revenue increased by three percent, then an increase by five percent in a booming economy would be a reasonable goal for this year.

Attainable

Ok, so the goal is specific and measurable, but is it **attainable**? Can it **reasonably be reached** based on the metrics? Typically, you want goals that are a little challenging to encourage growth, otherwise, what's the point of the goal if nothing's going to change? However, you don't want it to be too extreme or you'll never reach it. You'll have failed before you even started.

Aim to find a balance between the two extremes. For example, let's take the goal to run a 5K. Say you regularly run 2.5 kilometers, three times a week. An attainable goal will be to go from running 2.5 kilometers to running five kilometers within four weeks. An unattainable goal might be earning first-place in the 5K. I mean, it could happen, but it's not likely, especially if you've never run a race before. But how can you know if a goal is attainable, if it's unfamiliar?

A clue to helping you figure out if your **goal is attainable**, is to ask: **how can it be accomplished? Break down the goal into smaller parts and see if it makes sense**. Going from 2.5 kilometers to five kilometers over four weeks means increasing your distance by a little over half a kilometer each week. That's not so bad, use the same process on your Office Green project goal. Businesses usually conduct quarterly reviews. So let's assume that increase is expected to occur over the course of a year or four quarters. In order to meet the goal, you need to see an increase of at least 1.25 percent each quarter, seems pretty reasonable to me. What wouldn't be reasonable is setting a goal of increasing revenues by 50 percent or 100 percent, unless your research showed that business was improving that quickly.

Relevant

Your goal is specific, measurable, and attainable. Now let's see if it's **relevant**. In other words, does it **make sense to try and reach this goal**? Think about how the goal lines up with other goals, priorities and values. Ask whether **the goal seems worthwhile**. Does the **effort involved balance out the benefits**? Does it **match your organizations' other needs and priorities**? Everyone, from the client, the project team, and the people who will ultimately use the product, need to feel like **the goal is worth supporting**.

Also, **consider the timing**. Both the amount of time the project will take, as well as the larger economic and social contexts can have big impacts. There might be a budget to complete the project now, but will the company be able to sustain the project over time? Is there an audience that will continue to use the product or service once it's delivered? Once you've got the answers to these questions, you should have a clear goal to help steer the project. If you still don't feel confident about the project's goals, keep digging. It's okay to ask questions if you have doubts. Communicate your concerns with the project senior stakeholders and your direct supervisor if you have one. They should be able to address some of your concerns so that you can feel confident about moving forward.

Time-bound

If you're feeling good about the project being relevant and attainable, and you've made sure it's measurable, and has the specifics to keep you and your team focused the final item on the checklist is to make sure it's time-bound. **Time-bound** means your **goal has a deadline**. Deadlines give you a way to **track your progress**, otherwise, you may never reach your goal or never even get started.

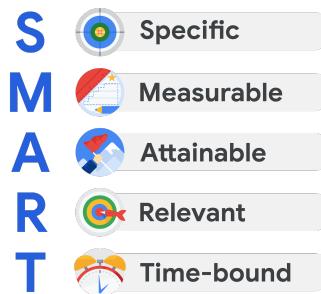
Time and metrics often go hand in hand, because **time can also be used as a metric**. Making your goal time-bound gives you a way to break down how much needs to be accomplished over time. **For example**, if you need to increase revenues by the end of the year, you can break down how much you need to increase each quarter, month, and week, and there you have it.

2.1.5 SMART goals: Making goals meaningful

In this lesson you are learning to define and create measurable project goals and deliverables. Now, let's focus on SMART goals.

Specific, Measurable, Attainable, Relevant, and Time-bound (SMART) goals are very helpful for ensuring project success. As you start your career in project management, you may not directly set the project goals, but you should be able to clarify and understand them. SMART goals help you see the full scope of a goal, determine its feasibility, and clearly define project success in concrete terms.

Let's recap what we discussed in the previous video by taking a look at a breakdown of the criteria for SMART goals below:



- **Specific:** The objective has no ambiguity for the project team to misinterpret.
- **Measurable:** Metrics help the project team determine when the objective is met.
- **Attainable:** The project team agrees the objective is realistic.
- **Relevant:** The goal fits the organization's strategic plan and supports the project charter.
- **Time-bound:** The project team documents a date to achieve the goal.

You may see variations on what each letter in the “SMART” acronym stands for. (For example, you may see “actionable” or “achievable” instead of “attainable” or “realistic” instead of “relevant.”) However, the general intent of each of these terms—to make sure the goal is within reach—is always similar.

Focusing on the "M" in SMART

Let’s take a moment to zoom in on the **M** in SMART, which stands for **measurable**. Having measurable goals allows you to assess the success of your project based on quantifiable or tangible metrics, such as dollar amounts, number of outputs, quantities, etc. Measurable goals are important because they leave little room for confusion around expectations from stakeholders.

Not every metric will have value, so you will have to determine which metrics make sense for the project. For example, measuring how many meetings the software engineers on your project attend on a weekly basis may not be the most valuable metric for a productivity goal. Alternatively, you might measure other aspects of the engineers’ productivity, such as a particular number of features created per engineer or a specific number of issues flagged per day.

Defining a SMART goal

Let’s explore an example related to making a personal goal measurable. Imagine you are looking to make a career change, and you set a goal to complete a Google Career Certificate. You can **measure** the success of this goal because after completing the entire program, you will receive a certificate—a tangible outcome.

Now, let’s determine how to make the remaining elements of this goal SMART. In this example, your **specific** goal is to attain a Google Career Certificate. You can make this goal **attainable** by deciding that you will complete one course per month. This goal is **relevant** because it supports your desire to make a career change. Finally, you can make this goal **time-bound** by deciding that you will complete the program within six months.

After defining each of these components, your SMART goal then becomes: Obtain a Google Career Certificate by taking one course per month within the next six months.

Key takeaway

Determining metrics can be extremely helpful in capturing statuses, successes, delays, and more in a project. As a project manager, identifying meaningful metrics can help move the project toward its goal. Additionally, by defining each element of a project goal to make it SMART, you can determine what success means for that goal and how to achieve it.

2.1.6 Activity: Define and determine SMART project goals

Activity Overview

In this activity, you will analyze a scenario to identify project goals. Then, you will write the goals using SMART criteria.

As a reminder, SMART goals must be:

- **Specific:**
- **Measurable**
- **Attainable:**
- **Relevant**
- **Time-bound**

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the scenario below. Then complete the step-by-step instructions.

Office Green, LLC, is a commercial landscaping company that specializes in plant decor for offices and other businesses. The company is getting ready to introduce its new Plant Pals service, which will provide high-volume customers with small, low-maintenance plants for their desks. You are the project manager assigned to manage the Plant Pals launch.

Office Green's main goal for this project is: "*Increase revenue by 5% by the end of the year by rolling out a new service that provides office plants to high-volume clients.*"

You recently met with the project sponsor (the Director of Product) to discuss two additional goals for the Plant Pals project:

1. *Boost Office Green's brand awareness*
2. *Raise Office Green's customer retention rate*

In order to help your team achieve these two additional project goals, you need to turn them into SMART goals. The notes from your meeting with the Director of Product are below. You can use this information to create SMART goals:

- Office Green's customer retention rate was 80% last year, but the CEO wants that number to increase by at least 10% this year.
- Last year, 70% of customers who left Office Green for competitors said they did so because they wanted more extensive services. When surveyed, 85% of existing customers expressed an interest in Plant Pals.
- The Vice President of Customer Success expects Office Green to achieve a customer satisfaction rating of over 90% this year—a slight increase over last year. The rating has stayed between 85%-90% for the last five years.
- The company plans to create an Operations and Training plan for Plant Pals to improve on existing customer service standards and boost efficiency.
- Office Green will promote the new service with a new marketing and sales strategy, a redesigned website with a new Plant Pals landing page, and a print catalog.
- With the publicity around the launch, Office Green projects that their customer base will grow by at least 15%.
- Website traffic has dipped slightly over the past three years, from 15K to 13K visits each month. The Marketing Manager wants unique page visits to increase by at least 2K each month by the end of the year, which is in line with the results of prior marketing campaigns.
- The project is scheduled to launch by the end of the third quarter. The project team will continue to collect data on the project's progress through the rest of the year and assess how well it has met its goals at the end of the fourth quarter. (It is currently the start of Q1.)

Revise the goals to be SMART

The template contains the two additional project goals for Plant Pals, neither of which meets all the SMART criteria:

1. “*Office Green will boost brand awareness*”
2. “*Office Green will raise their customer retention rate*”

Turn these two goals into SMART goals using the information from the scenario above. Write the revised goals next to **SMART Goal One** and **SMART Goal Two**. Your goals should be complete, but brief—one or two sentences is enough.

For example, here is a goal that's missing some of the SMART criteria:

“*Office Green will soon create an app to help customers care for their plants.*”

That's not a bad start, but it isn't specific, measurable, or time-bound. Here's the same goal, rewritten as a SMART goal:

“*Office Green will create an app that offers tips and reminders to help customers care for their plants. The app will be completed within 18 months and be compatible with 100% of the types of plants Office Green sells.*”

Explain what makes each goal SMART

Now that you've rewritten the goals, explain what makes them SMART by answering the following questions:

1. What makes the goal **specific**? Does it provide enough detail to avoid ambiguity?
2. What makes the goal **measurable**? Does it include metrics to gauge success?
3. What makes the goal **attainable**? Is it realistic given available time and resources?
4. What makes the goal **relevant**? Does it support project or business objectives?
5. What makes the goal **time-bound**? Does it include a timeline or deadline?

Be specific in your answers. For instance, the plant care app SMART goal is:

- **Specific:** The team knows what they're building: an app that helps users care for their plants and reminds them to do so.
- **Measurable:** The app will be complete when it includes 100% of the plant types Office Green sells.
- **Attainable:** The company has the knowledge, time, resources to build the app.
- **Relevant:** Office Green's business model relies on customers caring for their plants successfully.
- **Time-bound:** The goal includes an 18-month timeframe.

If you find that either goal does not meet all the SMART criteria, try revising it and answering the questions again.

Assessment of Exemplar

Let's review each SMART goal:

SMART goal one

The original goal indicates that Office Green will boost its overall brand awareness through Plant Pals, but it doesn't indicate how they will do it, whether it's possible, why it's important, or when they will get it done. The SMART goal addresses all these questions, which increases Office Green's chances of reaching their aim:

"Office Green will boost brand awareness with a new marketing and sales strategy and website update that will increase page views by 2K per month by the end of the year."

- **Specific:** Office Green will update their website and launch a new marketing and sales strategy to boost awareness of their brand.
- **Measurable:** The goal includes a metric of 2K new page views per month.
- **Attainable:** They have a year to reach this goal and the target of 2K new page views per month is in line with prior marketing campaigns.
- **Relevant:** Greater brand awareness can mean new customers, which supports the overall project goal of a 5% revenue increase.
- **Time-bound:** The deadline is at the end of the year.

SMART goal two

The original goal indicates that Office Green will raise their customer retention rate, but it doesn't indicate how they will do it, whether it's possible, why it's important, or when they will get it done. The SMART goal addresses all these questions, which increases Office Green's chances of reaching their aim:

"Office Green will raise their overall customer retention rate by 10% by the end of the year by implementing a new Operations & Training plan for the Plant Pals service."

- **Specific:** Office Green will implement an Operations & Training plan that will improve on existing customer service standards and boost efficiency.
- **Measurable:** The goal includes a metric of a 10% increase in retention.
- **Attainable:** They have a year to reach this goal and many former and existing customers are interested in the new service. It has the potential to help them keep customers who may be thinking about leaving for a landscaper with more services.
- **Relevant:** Increasing customer retention can lead to more sales, which supports the overall project goal of a 5% revenue increase.
- **Time-bound:** The deadline is at the end of the year.

2.1.7 Introduction to OKRs

You've just learned about, and practiced, the SMART method for defining project goals. Like the SMART method, **OKRs help establish and clarify goals or objectives** for an **organization, department, project or person**. OKRs take SMART goals a step further by **combining a goal and more detailed metrics to determine a measurable outcome**. They not only state **clearly what the goal is**, they **provide specific details** that allow you to measure the success of the goal. One way to think about OKRs is that they **separate the different components of SMART goals and clarify them even further**, rather than grouping everything into one statement.

The **O** stands for **objective**, and **defines what needs to be achieved**. It **describes the desired result or outcome**, such as an increase in customer retention, or an improvement on the employee onboarding process. **KR** stands for **key results**. These are the **measurable outcomes** that **define when the objective has been met**. For example:

Objective : to improve customer retention

Key result : to have 90 percent customer satisfaction rating by the end of the first quarter.

Recall that one of the SMART criteria is **attainability**, which means it's practical to achieve the goal. **Key results**, however, **should be a little more ambitious**. Here at Google, we actually **use OKRs to set stretch goals** as a way to challenge ourselves to do something we haven't accomplished before.

Organizations often **set OKRs at different levels**, such as the **company level, department or team level, and project level**. **Company-level OKRs** are commonly **shared across an organization** so that everyone is clear on the company's goals. They are usually **updated on an annual basis** to help drive the organization in the direction it wants to go. These high-level OKRs support the mission of the organization. **Project-level OKRs** should

support and be aligned with company-level OKRs. An example of a company-level objective at Office Green:

"increase customer retention by adapting to the changing workplace environment"

This is a big, aspirational goal that applies to the entire company and all of its endeavors. In order to focus their efforts to reach this objective, Office Green might develop key results that include:

- 95 percent of phone, chat, and email customer support tickets are resolved during the first contact.
- Top three most requested new offerings for distributed office environments are in pilot by the end of the second quarter.
- Sales and support channels are available 24/7 by the end of the year.

Some of these company-level key results could **become the basis for projects**. For example, the key result, "top three most requested new offerings for distributed office environments that are in pilot by the end of the second quarter," could become the Plant Pals project.

Team or department-level OKRs, support the company's broader OKRs and help drive team performance. Departments may develop OKRs that are **more specific to their job function** as well. For example:

The company-level key result : sales and support channels are available 24/7 by the end of the year

Sales department objective : increase the sales team presence nationwide.

Sales department key result : new sales offices are open in 10 cities by the end of the year.

Project-level OKRs are set during the initiation phase to help define measurable project goals. They're **tracked throughout the planning and execution stages** to measure project success. Project-level OKRs **need to align with and support both company and department-level OKRs**. For example :

Office Green's company-wide objective : to increase customer retention by adapting to the changing workplace environment

Project objective for Plant Pals : to enroll existing customers in the Plant Pals service.

Project key result : 25 percent of existing customers sign up for the Plant Pals pilot.

2.1.8 Creating OKRs for your project

What are OKRs?

OKR stands for objectives and key results. They combine a goal and a metric to determine a measurable outcome.

Objectives	Key results
<ul style="list-style-type: none">• Defines what needs to be achieved• Describes a desired outcome	<ul style="list-style-type: none">• The measurable outcomes that objectively define when the objective has been met

Company-wide OKRs are used to set an ultimate goal for an entire organization, whole team, department, and project-level OKRs describe the focused results each group will need to achieve in order to support the organization.

OKRs and project management

As a project manager, OKRs can help you expand upon project goals and further clarify the deliverables you'll need from the project to accomplish those goals. Project-level OKRs help establish the appropriate scope for your team so that you can say "no" to requests that may get in the way of them meeting their objectives. You can also create and use project-level OKRs to help motivate your team since OKRs are intended to challenge you to push past what's easily achievable.

Creating OKRs for your project

Set your objectives

Project objectives should be aspirational, aligned with organizational goals, action-oriented, concrete, and significant. Consider the vision you and your stakeholders have for your project and determine what you want the project team to accomplish in 3–6 months.

Examples:

- Build the most secure data security software
- Continuously improve web analytics and conversions
- Provide a top-performing service
- Make a universally-available app
- Increase market reach
- Achieve top sales among competitors in the region

Strong **objectives** meet the following criteria. They are:

- Aspirational
- Aligned with organizational goals
- Action-oriented
- Concrete
- Significant

To help shape each objective, ask yourself and your team:

- Does the objective help in achieving the project's overall goals?
- Does the objective align with company and departmental OKRs?
- Is the objective inspiring and motivational?
- Will achieving the objective make a significant impact?

Develop key results

Next, add 2–3 key results for each objective. Key results should be time-bound. They can be used to indicate the amount of progress to achieve within a shorter period or to define

whether you've met your objective at the end of the project. They should also challenge you and your team to stretch yourselves to achieve more.

Examples:

- X% new signups within first quarter post launch
- Increase advertiser spend by X% within the first two quarters of the year
- New feature adoption is at least X% by the end of the year
- Maximum 2 critical bugs are reported monthly by customers per Sprint
- Maintain newsletter unsubscribe rate at X% this calendar year

Strong **key results** meet the following criteria:

- Results-oriented—**not** a task
- Measurable and verifiable
- Specific and time-bound
- Aggressive yet realistic

To help shape your key results, ask yourself and your team the following:

- What does success mean?
- What metrics would prove that we've successfully achieved the objective?

OKR development best practices

Here are some best practices to keep in mind when writing OKRs:

- Think of your objectives as being motivational and inspiring and your key results as being tactical and specific. The objective describes what you want to do and the key results describe how you'll know you did it.
- As a general rule, try to develop around 2–3 key results for each objective.
- Be sure to document your OKRs and link to them in your project plan.

OKRs versus SMART goals

Earlier in this lesson, you learned how to craft SMART goals for your project. While SMART goals and OKRs have some similarities, there are key differences, as well. The following article describes how SMART goals and OKRs are similar, how they differ, and when you might want to use one or the other: [Understanding the Unique Utility of OKRs vs. SMART Goals](#)

To learn more how OKRs work to help project managers define and create measurable project goals and deliverables, check out the following resources:

- [Google's OKR playbook](#)
- [Planning company goals](#)
- [OKRs and SMART goals: What's the difference?](#)
- [OKRs and KPIs: What They Are and How They Work Together](#)
- [How OKR and project management work together](#)
- [OKR Examples](#)

- [OKR TED Talk](#) video (John Doerr, the founder of OKRs, explains why the secret to success is setting the right goals.)

2.1.9 Activity: Create OKRs for your project

Activity Overview

In this activity, you will practice creating OKRs (objectives and key results) for a project. OKRs combine a goal and a metric to determine a measurable outcome. Objectives define what needs to be achieved and describe a desired outcome, while key results define how you will measure that outcome.

As a project manager, creating OKRs can help you clarify both your overall project goals and the deliverables you'll need to accomplish those goals. You can also create project-level OKRs to help motivate your team.

When you finish the activity, we'll take you through an exemplar of the completed assignment that you can compare to your own work. You will not be able to access the exemplar until you have completed this activity. Be sure to review these exemplars carefully, so you know what you did well and how you can improve next time. Keep in mind that some activities can have more than one right answer, just like real problems can have more than one solution. The exemplars for these activities explain one way of doing things, but they also point out where you could do things differently. This helps you check your approach to an assignment, not just your answers

Scenario

Review the scenario below. Then complete the step-by-step instructions.

Wonder City is a mid-sized city where increasing growth and traffic are impacting quality of life. According to a recent market assessment, the region's population is expected to double in the next five years. Job growth is also expected to increase by 48%. This growth will impact street networks, parking and mobility.

Wonder City has several city-wide objectives related to reducing traffic congestion and improving the city's infrastructure. In order to support these city-wide objectives, the Wonder City Transportation Authority (WCTA) will be launching five new bus lines. This initiative has been nicknamed Project Move It.

You have been hired as the project manager for this initiative. As the project manager, you will set OKRs to help clarify the project goals and define what needs to be done in order to deliver a successful project.

Here is some additional information about the project:

- The project needs to be completed within two years.
- Community member buy-in and support for the locations of the new bus lines will be required.
- The project must adhere to all government regulations.

- Stops along the new bus lines must connect neighboring suburbs to downtown and public resource facilities.
- Bus lines must service at least 50% of the most densely-populated areas of Wonder City.
- The project is intended to help improve wait times and increase ridership.
- The plan includes a marketing campaign to promote the new lines.

Draft your first objective

Potential objectives for Project Move It:

- Actively and meaningfully engage the public to generate buy-in and project support.
- Make it easy to get around the greater Wonder City area via public transportation.
- Promote public transportation as a convenient alternative to driving.
- Provide a reliable and consistent public transportation service.

Or, if you prefer, you may draft your own objective based on the scenario.

Remember that effective objectives are:

- **Aspirational:** Is the objective challenging and inspiring?
- **Aligned with company goals:** Does the objective support company and/or departmental OKRs?
- **Action-oriented:** Does the objective motivate the team to take initiative?
- **Concrete:** Can the project team easily grasp the objective?
- **Significant:** Will achieving the objective make a meaningful impact or change from where you are currently?

For example, if the objective of an educational technology company was to provide products that consistently meet new educational standards, a project objective might be: “*Successfully launch version 2.0 of our early learning app in time for the national curriculum conference.*”

Add key results

Each key result should address the following questions:

- Does the key result help define success for your team?
- Can it be measured to prove that you've achieved your objective?
- Is it specific and time-bound?
- Is it ambitious yet realistic?

Your key results should build on the scenario and additional project information, but it's up to you to determine your success criteria. As an example, let's return to the objective, “*Successfully launch version 2.0 of our early learning app.*” If you knew that a successful launch meant getting new users to download the app, you could create any of the following key results for the objective:

- 15,000 new downloads within first quarter post launch
- 75,000 new downloads within first year post launch
- 25% of monthly downloads from new customers

Remember: OKRs are never set in stone--they can and should be revised as you make progress, so it's okay if you need to adjust your key results later on.

Project Move It OKRs

O1 Actively and meaningfully engage the public to generate buy-in and project support.

KR1 400 attendees to 12 public meetings focused on transit talks

KR2 75% of Wonder City residents surveyed before launch

KR3 70% of community leaders participate in community outreach program

O2 Make it easy to get around the greater Wonder City area via public transportation.

KR1 Busses on new lines run every ten minutes during peak hours.

KR2 The most densely-populated sections of Wonder City (1,500–2,000 people per sq. mile) have three bus stops per ten city blocks.

KR3 New ridership increases by 25% within three months

O3 Promote public transportation as a convenient alternative to driving.

KR1 6,000 unique visitors to the WCTA online portal per month

KR2 80% click-through rate from banner ads on social media

KR3 15 press pieces published in relevant print and online publications

O4 Provide a reliable and consistent public transportation service.

KR1 100% of new busses meet government safety standards at monthly inspections

KR2 95% of new bus fleet operational at all times

KR3 Wait times decrease by 20% within two months of launch

Assessment of Exemplar

Compare the exemplar to your completed OKRs. Review your work using each of the criteria in the exemplar. What did you do well? Where can you improve? Use your answers to these questions to guide you as you continue to progress through the course.

Note: The exemplar gives three key results for each objective, but there are many more you could develop. Because you can measure success in various ways, your lists of key results

may differ. The important thing to keep in mind is that your OKRs should help you expand upon your project goals and further clarify the deliverables you'll need from the project in order to accomplish those goals.

Let's review each OKR in the exemplar:

OKR #1: Actively and meaningfully engage the public to generate buy-in and project support

Each key result uses measurable data to define success for the objective. For example, “*400 attendees to 12 public meetings focused on transit talks*” measures engagement in the number of attendees at public meetings about transit.

OKR #2: Make it easy to get around the greater Wonder City area via public transportation.

Each key result uses measurable data to define success for the objective. For example, “*New ridership increases by 25% within three months*” measures the increase in bus ridership in the city in response to the community’s improved ability to get around the city with ease.

OKR #3: Promote public transportation as a convenient alternative to driving.

Each key result uses measurable data to define success for the objective. For example, “*80% click-through rate from banner ads on social media*” measures the success of the promotional campaign in public engagement with social media ads.

OKR #4: Provide a reliable and consistent public transportation service.

Each key result uses measurable data to define success for the objective. For example, “*100% of new buses meet government safety standards at monthly inspections*” measures the reliability and consistency of buses that pass regular safety inspections.

Test your knowledge: Identifying project goals

1. Which three questions should you ask yourself to make a goal specific?

- What do I want to accomplish?

 **Correct**

When crafting a goal, you want to explain what will be done.

- Where should it be delivered?

 **Correct**

When writing a goal, you may want to include where exactly the goal will be delivered.

- Can it be reasonably reached?

- Who is involved?

 **Correct**

When creating your goal, you'll want to state who the goal involves.

2. Which of the following is an example of a measurable goal? Select all that apply.

- Achieve a 20% improvement in customer satisfaction ratings based on post-support survey results

 **Correct**

Measurable goals allow you to assess the success of your project based on quantifiable or tangible metrics, such as dollar amounts, percentages, number of outputs, and quantities.

- Reduce employee turnover

- Increase market reach

- Increase product revenue by 5%

 **Correct**

Measurable goals generally include metrics, like figures and numbers, that help the project team determine when the objective is met.

3. What's a strategy to determine if a goal is attainable?

- Post the goal on a project management forum for feedback

- Hire a goal-setting coach

- Ask the stakeholders

- Break down the goal into smaller parts

 **Correct**

Taking a complicated goal and breaking it down into smaller, achievable steps can help you determine if it seems reasonable for your team to accomplish.

4. What can you do to determine if a goal is relevant?

- Consider if the goal matches the organization's other needs and priorities.
- Compare it to the project goals of the organization's three closest competitors.
- Ask a project manager on another team.
- Compare it to goals the organization set in previous years.

 **Correct**

The goal needs to align with the organization's other goals, priorities, and values. Everyone involved should feel like the goal is worth supporting.

5. Which of the following are examples of key results? Select all that apply.

- Launch a website redesign
- Increase the number of website visitors by 25%

 **Correct**

A key result details how to tangibly measure the success of the objective. This is an example of a key result for the objective: launch a new website.

- Implement online ordering
- Successfully process 50 online orders

 **Correct**

A key result details how to tangibly measure the success of the objective. This is an example of a key result for the objective: implement online ordering.

6. Which of the following are objectives and key results (OKRs) development best practices? Select all that apply.

- Each key result should have 2-3 objectives
- Objectives should be motivational and inspiring.

 **Correct**

Project objectives should be aspirational, aligned with organizational goals, action-oriented, concrete, and significant.

- Key results should be tactical and specific.

 **Correct**

Key results should challenge the project manager and the team to stretch their abilities and achieve more.

- OKRs are a resource that should be linked to the project plan.

 **Correct**

The project manager should document all OKRs and link to them in the project plan for visibility.

2.2 Defining Project Scope

2.2.1 Determining a project's scope

Project scope includes the boundaries of a project. The way we define it at Google is "an agreed upon understanding as to **what is included or excluded from a project.**" Scope helps **ensure** that your **project is clearly defined and mapped out.** That means knowing exactly who the project will be delivered to and who will be using the end result of the project. You also need a **firm understanding of the project's complexity.** Is it straightforward with an easily manageable list of tasks? Or will it require extensive research, multiple rounds of approvals, and a large-scale production process that will take years to complete?

Scope also includes the project timeline, budget, and resources. You need to clearly define these so that you can make sure you're working within those boundaries and what's actually possible for the project to work. **Poorly-defined scope or major changes** to your scope can cause **changes to the budget, timeline, or even final outcome** of the project.

Let's look at the scope of your Office Green project as an example. As a reminder, the new Plant Pals service offers customers small, low-maintenance, plants like cacti and leafy ferns that they can place on their desks. Customers can order them online or from a print catalog, and Office Green will ship the plants straight to the customer's work address. Things to consider for your scope, then, might be whether or not to provide replacement plants; which customer segments will be offered the service; whether or not the online catalog is an app, a website, or both; and how to ensure customers can purchase from the online catalog, whether by phone, PC, Mac, iPhone, or Android. You might also consider the dimensions of the paper catalog and whether it needs to be in color or black and white and on what kind of paper.

Now, **how do you actually figure out the scope of your project?** It's simple: **talk to your sponsors and stakeholders, understand what their goals are, and find out what is not included** in the project. We've covered a number of different ways to help you determine scope. Here are a few more helpful questions to add to the list.

- Where did the project come from?
- Why is it needed?
- What is the project expected to achieve?
- What does the project sponsor have in mind?
- Who approves the final results?

As for timing, **defining project scope** should **happen during the initial planning stage.** You want to start figuring out the scope early on so that everyone can agree to the same set of expectations. It will help **mitigate the risks of big changes** down the line. Although you can always adjust the scope as planning continues, if you need to. Once you understand your project scope, you want to document all the details so that anyone can refer back to it throughout the life cycle of the project.

Let's recap: **a clearly defined scope** describes all the **details of a project** and regulates **what can be added or removed** as it progresses. While it's ultimately the project manager's

responsibility to monitor the project and make sure all the work and resources fall within its scope, team members and stakeholders can be encouraged to do their part by focusing on the task that are the most important to reaching the project's goal.

2.2.2 Gathering information to define scope

In this lesson, you are learning to define project scope status and differentiate in-scope, out-of-scope, and scope creep factors that affect reaching the project goal. Let's focus here on how to identify vital elements of a project's scope and examine the right questions to ask in order to define it.

Asking scope-defining questions

Imagine that while working in a restaurant management group, your manager calls and asks you to "update the dining space," then quickly hangs up the phone without providing further instruction. In this initial handoff from the manager, you are missing a lot of information. How do you even know what to ask?

Let's quickly recap the concept of scope. The scope provides the boundaries for your project. You define the scope to help identify necessary resources, resource costs, and a schedule for the project.

In the situation we just described, here are some questions you might ask your manager in order to get the information you need to define the scope of the project:

Stakeholders

- How did you arrive at the decision to update the dining space?
- Did the request originate from the restaurant owner, customers, or other stakeholders?
- Who will approve the scope for the project?

Goals

- What is the reason for updating the dining space?
- What isn't working in the current dining space?
- What is the end goal of this project?

Deliverables

- Which dining space is being updated?
- What exactly needs to be updated?
- Does the dining space need a remodel?

Resources

- What materials, equipment, and people will be needed?
- Will we need to hire contractors?
- Will we need to attain a floor plan and building permits?

Budget

- What is the budget for this project? Is it fixed or flexible?

Schedule

- How much time do we have to complete the project?
- When does the project need to be completed?

Flexibility

- How much flexibility is there?
- What is the highest priority: hitting the deadline, sticking to the budget, or making sure the result meets all the quality targets?

Key takeaway

Taking the time to ask questions and ensure that you understand the scope of the project will help reduce expenses, rework, frustration, and confusion. Make sure you understand the *who, what, when, where, why, and how* as it applies to the scope. If you are missing any of that information, focus your questions on those elements. The initiation phase of the project sets the foundation for the project, so ensuring that you understand the scope and expectations during this stage is essential.

2.2.3 Monitoring and maintaining a project's scope

An important part of project management is keeping an eye on your project scope and knowing which tasks are truly part of the plan and which aren't. **Tasks that are included in the project and contribute to the project's overall goal** are considered to be **in-scope**. **Tasks that aren't included** are called **out-of-scope**. It's your job as a project manager to **set and maintain firm boundaries** for your project so that your team can **stay on track**. For example, if the copywriters or designers of the Plant Pals catalog, came up with the idea to expand the type of plants being offered to top customers, you would have to point out that their suggestion is out-of-scope and would take extra time and add to your budget costs.

As you progress through the project life cycle, you're going to encounter unexpected challenges or have new details or ideas brought to your attention that could impact your project's success. **Changes, growth, and uncontrolled factors that affect a project scope** at any point after the project begins are referred to as "**scope creep**." Scope creep is a common problem, and it's not always easy to control. It's one that we struggle with on every single project. It can happen on any project, in any industry.

Imagine you're working in a tech company and your project involves working with designers and engineers to update the language icons' design on a mobile keyboard app for a smartphone. While the team is making the update, they realize that the search icon and the voice input icon also need a design refresh. These are very small features, and while technically not in-scope, the team feels it would take minimal effort and provide lots of value. So they go ahead and make the updates. During a stakeholder review, it's pointed out that

there is a keyboard in English, but no keyboards for other languages, and the suggestion is made to design additional keyboards. At this point, the project's scope is in danger of expanding from a fairly simple icon update to a complex rollout of multiple keyboard layouts. Adding the keyboards would impact the team's timelines, causing the project to take longer to finish. It would also impact resourcing, because you would need to hire more people or existing team members would have to work overtime. And it would increase the budget, since the team did not anticipate costs for extra working hours or keyboard translations.

By **identifying scope creep and being proactive**, you **protect your project** and your project team. To help you combat scope creep, it's good to know that there are **two major sources** from which it comes: **external and internal**.

External sources of scope creep are easier to recognize. For example, if you're working on a project with one **main customer**, the **customer might request changes**, or the **business environment around you might shift**, or the underlying **technology you're using might change**. While you can't control everything that happens, there are some useful tips to keep in mind.

- **Make sure the stakeholders have visibility into the project.** You want them to know the details of what's going to be produced, what resources are required, how much it will cost, and how much time it'll take.
- **Get clarity on the requirements and ask for constructive criticism** of the initial product proposal. It's important to get this information before any contracts are signed.
- **Set ground rules and expectations for stakeholder involvement** once the project gets started. Come to an agreement on each of your roles and responsibilities during execution and status reviews.
- **Create a plan for dealing with out-of-scope requests.** Agree on who can make formal change requests and how those requests will be evaluated, accepted, and performed.
- **Put these agreements in writing.** This way, you'll always have documentation to point if you, a stakeholder, or the customer have a disagreement down the line.

One of the **leading causes of external scope creep** is **not being clear on the requirements** before defining the scope and getting formal approval to move forward with the project. This is where those specific and measurable goals and deliverables come into play. If the requirements aren't specific and if you haven't agreed on the project's processes, deliverables, and milestones, then you're almost guaranteed to be dealing with scope creep once the project begins.

Internal sources of scope creep are **trickier to spot and harder to control**. This kind of creep comes from **members of the project team** who **suggest or even insist on process or product changes or improvements**. It's possible that a product developer will justify a decision on the grounds of making the product better, even though it's going to cost more, or a team lead might decide that a certain process is more efficient without realizing the impact the change in process will have on other team members tasked with different parts of the project. What you need to make clear to your team is that any change outside of the project scope comes off the bottom line, threatens the schedule, and increases risk.

There are no small impacts to project scope. Any time a team member takes on an unplanned task, more is lost than just the time spent working on that task. It's your responsibility as the project manager to maintain the limits of the project. The best defense is to know the details of your project in and out so you're always prepared with the most appropriate response to a new idea or request.

Test your knowledge: Defining project scope

1. Which of the following best describes the difference between in-scope and out-of-scope?

- Tasks you believe your team should complete first and tasks the team believes they should complete first
- Goals you believe your team needs to meet and goals the stakeholders believe the team needs to meet
- Items within the project boundaries that are contributing to the project's overall goal and items that are not
- Problems the project manager can easily recognize and problems the project managers cannot recognize



It's your job as a project manager to set firm boundaries for the project so the team can stay on track.

2. Which of the following best describes scope creep?

- Changing a project after it begins
- Changing a project before it begins
- Adding members to a project team
- Cancelling a project after it has begun



Scope creep refers to changes, growth, and uncontrolled factors that affect a project scope at any point after the project begins.

3. What are some tactics to handle external scope creep? Select all that apply.

- Limit communication outside the team once the project begins
- Suggest alternative solutions to your customer's or stakeholder's proposed changes.

 **Correct**

Providing alternative solutions to your customer or stakeholder might result in their deciding against their proposed changes. You can also help them consider how their proposed changes might create additional risks, and perform a cost-benefit analysis, if necessary.

- Define the project's requirements.

 **Correct**

To ensure the project team agrees on the project's goal, ask stakeholders for feedback on what the project will produce, what resources are necessary, what costs are involved, and how long the project will take. Then, document these requirements.

- Tell team members to ignore outside requests that will add project tasks.

4. A designer on your project team suggests making changes to the product's logo just prior to launch. What's a strategy that could help avoid this internal scope creep?

- Push back the product's launch date to allow time for the design to implement changes to the logo.
- Have the designer begin to implement the logo design changes immediately.
- Assign some of the designer's tasks to someone else so they can begin working on the logo changes.
- Remind the designer about the project's scope and the effects of internal scope creep.

 **Correct**

Any changes to the product or processes can affect the bottom line or schedule and risk successfully completing the project.

2.2.4 Managing changes to a project's scope

Managing scope goes hand in hand with goal-setting. For example, **redefining the scope can change the goal**, and a **revision of the goal can change the scope**. The concept of project scope is important throughout the project. While your project will have its own specific goals, the overall goal for you as the project manager is to deliver the project according to the scope agreements. This includes delivering the project within the given deadline and the approved budget. As you progress through your project, you will continually need to make compromises and weigh trade-offs as new challenges and changes and factors present themselves. Any time a team member takes on an unplanned task, more is lost than just the time spent working on that task. In order **to decide if a scope change is acceptable and what impact it will have**, project managers usually refer to **the triple constraint model**.

The **triple constraint model** is the **combination of the three most significant restrictions** of any project: **scope, time, and cost**. We've talked a bit about what scope is,

so let's focus now on time and cost. **Time refers to the project schedule and deadlines.** **Cost includes the budget**, and it also **covers resources and the people** who will work on the project. Both time and budget have to be carefully managed alongside scope. **All three of these are linked**; you **can't change one without having an impact on the others**. For example, a decrease in cost means a change in time or scope. An increase in time means a change in scope or cost, or both. Understanding how changing one impacts the other two constraints is key. It's important to **consider what trade-offs** you're willing to make as the project progresses. To do this successfully, you need a clear **understanding of the project priorities**. You have to know what is most important when it comes to scope, time, and cost. If there's a specific deadline that must be met, then you need to limit any changes to the scope that might cause the project to go past the deadline.

If the product must look or function in a certain way, then the requirements are a priority, and you could justify changes in cost or time in order to meet the scope requirements. But just because you can make a change, that doesn't mean you necessarily should make a change. And even though the limits of scope, time, and costs have been set, you can still make changes if there's a good reason to do so. Don't worry, you won't have to decide on these changes all by yourself. If there are scope decisions that need to be made, the project manager will likely need to **consult with the project sponsor and stakeholders** to get their approvals.

Let's go through a few scenarios, so you can get familiar with weighing the value of a trade-off and understanding the impacts of any changes.

- A request has been made to improve the Plant Pals product features. The Director of Product at Office Green wants to use pots that indicate when the plants need to be watered. Making changes to the product is a scope change. You know that you can't change the budget, but you can extend the timeline. So you can accept the scope change requests and extend the timeline, as long as the budget doesn't increase.
- A request has been made to reduce the budget without making any changes to the scope. The final outcome of Plant Pals still needs to look and function as you all originally agreed. If you're going to reduce the budget and keep the scope, you may need to extend the timeline.
- There's a request to tighten up the timeline and finish early, but you can't increase the budget. In order to do this, you need to make changes to the scope, like limiting shipping options. Doing this will give your project more time, because you'll have one less shipping contract to negotiate. The end result won't be exactly what was originally agreed on, but it means getting it out earlier as requested and within budget.
- The Director of Product informs you that the project deadline must be met—it's the most important thing. In this case, your stakeholders are willing to increase the budget and make any necessary changes to the scope requirements in order to meet the deadline. In the end, it's all about prioritizing which element of the triangle matters the most in the project.

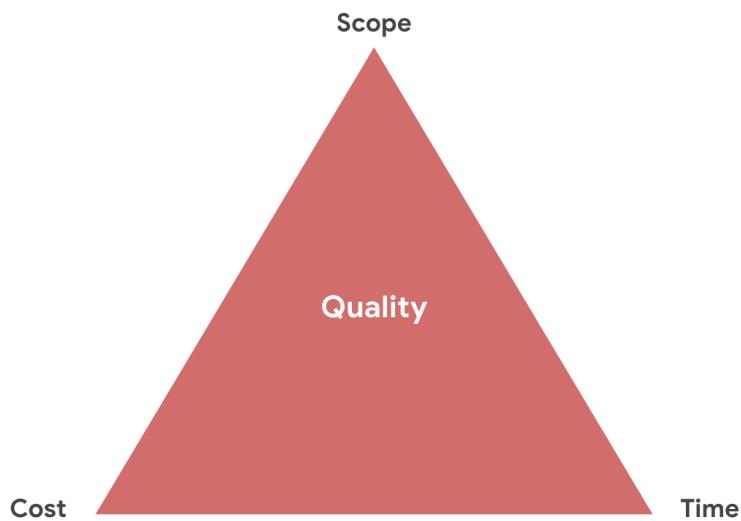
Keeping in mind scope, time, and cost as you manage your project will help you navigate different conditions while still achieving your goals. Remember, change is inevitable when managing projects, and understanding this framework can set you up to plan and communicate accordingly so your project will succeed.

When you understand **the triple constraint model**, you'll have the **tools to evaluate scope changes**. Understanding how changes will be evaluated, accepted, and performed is key to scope management.

2.2.5 Reviewing the Triple Constraint

As you've just learned, project managers may refer to the **triple constraint model** to manage scope and control scope creep. It can serve as a valuable tool to help you negotiate priorities and consider trade-offs.

For further reading on utilizing the triple constraint model in real-life scenarios as a project manager and how the triple constraint model has evolved over time, we recommend checking out this article: [A Project Management Triple Constraint Example & Guide](#)



2.2.6 Reflection: Applying the Triple Constraint

In this quiz, you will practice applying the Triple Constraint (budget, time, scope) to the following project scenario:

Imagine you are a User Experience (UX) Program Manager at a small design agency. You are asked to manage an 8-week project for \$800,000 USD. The project includes conducting field research and synthesizing results. As the final deliverable, your agency will create a research report and facilitate a 3-day workshop. You need to align with the client's Vice President (VP) of Design, Ria. Luckily, you have a team of five teammates to work on this project together!

For the three situations below, describe how you would apply the Triple Constraint model. Provide examples to help illustrate your explanations. Are you ready?

Situation 1

During the scoping of this project, Ria says her budget maxes out at \$650,000 USD—she can't afford the \$800,000 USD that this project will cost. What are some proposals you can

provide to Ria to reduce the budget? Think of the Triple Constraint and remember that one constraint will always have the priority. So if the budget is a constraint, what areas might Ria adjust to reduce project costs? Write 2-3 sentences.

Reduce the scope: Maybe you can convince Ria to have a 1-day workshop instead of a 3-day workshop. This will help trim the budget.

Reduce the time: If you can deliver just the research report presentation instead of a 3-day workshop, you can trim the budget by shaving-off the three workshop days. This also reduces the time you need to prepare for the workshop.

Situation 2

Recruiting for field research will take a week longer than expected. However, Ria told you that the project end date is a hard deadline. What can you do? Think of the triple constraint and remember that one of them will always have the priority. So if time is a constraint, what areas might Ria adjust to reduce the time in the project? Write 2-3 sentences.

Increase the budget: If you can increase the budget and add an additional field researcher, you could complete the research faster and meet the hard deadline.

Cut the scope: If you can eliminate sections in the research report, you could save time. Or, similar to the example above, cut the workshop to a 1-day workshop to meet the deadline

Situation 3

After the stakeholders agree on the project scope, Ria finds out that her CEO wants more information in the research report. She asks you to include details on the market opportunities for new product ideas, technical constraints, and design considerations. How do you manage this additional scope? Write 2-3 sentences.

Decrease the time: If you can cut the depth of the initial market research, you will shave a few days off the project. This will allow additional time to work on the information on new products at the end of the project.

Increase the cost: If Ria can agree to increase the project budget to accommodate her CEO's request, you can add additional team members to work on the expanded scope and meet the existing project timelines.

As a reminder, if there are changes in time, budget, and scope, remember to notify your project sponsor and key stakeholder and make sure they're aligned. In this specific example, you should notify the internal stakeholders, so that they can make decisions about what to do about the changes in the project, while considering the Triple Constraint.

2.3 Measuring A Project's Success

2.3.1 Launching and landing a project

At this point, you've learned a bit about setting **SMART goals**, along with defining and managing the **scope**. It may be tempting to think that you're ready to kick off this project with these two important pieces, but there is **one common element that ensures you'll achieve these goals within scope**. And that **key element** is knowing when your project is delivered and you can call it a **success**.

Many people think the time to decide if a project is successful is when you've produced the final outcome and presented it to the client. That's getting close. **Delivering the final result of your project to the client or user** is what's called a **project launch**. You finish building or creating a project, the tasks are completed, and the deliverables are done. You've hit your goal. The project is successful and considered complete in that sense, but **does it work well?** Did it **achieve your desired outcome?**

The **real deciding factor of project success** is when you **put the final outcome to the test**. **Landing** is when you actually **measure the success** of your project using the **success criteria established at the outset** of the project. This is a **crucial part of goal setting** that is often overlooked in the initiation phase. For example, think about taking a trip on an airplane. It's not enough for the pilot to be able to get the plane off the ground. To arrive safely at your destination, they've got to know how to land.

Your success has to continue beyond the point of delivering the final project. You need to be able to measure whether the project functions as intended once it's put into practice.

Let's take the example of your project Plant Pals. You've managed to launch the new service with success, the website has launched, the catalogs have been printed and delivered, orders have been received, and revenue is starting to go up. It would be easy to call this a win and move on. But what happens if the customers are unhappy once the plants are delivered? What if the plants start to wilt and discolor after a couple of weeks?

Just because launching the project and getting it out the door looks like success on paper, that doesn't mean the project has managed to land. For most projects, a **launch itself isn't a meaningful measure of success**. It's what comes after the launch that really counts. **Launches are only a means to an end**, and looking beyond the launch is important to **ensure the launch achieves your overall goals**. If you start off looking beyond the launch to the landing, you're more likely to get where you're trying to go. Since landing is a concept and not a finite definition, it's important to define what a successful landing looks like for a particular project. Luckily, we have a **way to measure and help you ensure the success of your project**. It's called **success criteria**, and if you can manage to follow it through the life cycle of your project, you'll ultimately have a smooth landing.

The **success criteria includes** all the **specific details of your goals and deliverables**, and it can be a **guide** so you know whether you've accomplished what you set out to do.

2.3.2 Don't forget to land: Measuring project success

In this lesson, you are learning to distinguish the difference between a project launch and a project landing. Let's focus here on the difference between launches and landings and how to ensure that your project will be completed successfully.

You will often hear companies celebrating the launch of a new product, service, or initiative, and it is important to remember that even when your project is out in the world, your work isn't complete. When working on a project, the goal isn't simply to launch it, but to land it. Landings occur once your project achieves a measure of success. As project managers, landings are what we strive for and what we celebrate. They are the ultimate reward for all of our efforts.

Launching vs. landing a project

In project management, a project “launching” means you have delivered the final results of the project to the client or user. You can’t solely base project success on when the client accepts the project, though. Your work on a project won’t be complete until you “land” it by thoroughly measuring the results. This is when the **success criteria** and the metrics you defined initially when setting SMART goals will come in handy.

Teams should be clear on what they are trying to accomplish, beyond just launching something to users. Will your project increase retention? Will your project speed up a product feature? Depending on the product and situation, the answers will differ, but it is important that your team aligns and works toward the same measurable goal.

Launch first, land later

Let's consider an example: imagine you are a project manager for an eco-friendly organization. Your organization asks you to create a training program for middle school students in your county to teach them about the impacts of recycling. The county's goal is to increase recycling by 20% over the next five years. You gather your team and start developing the learning content to build out this training program. It takes you and your team one year to complete the research, development, and production of this training. When you hand over the training to the school district, you are launching the project. In order to know your project actually landed at the intended goal, you need to check back in periodically over the next five years to see if the training program is on target to produce a 20% increase in recycling in the county.

Launch and forget

A common mistake of many project teams is to “launch and forget” the results. This happens when a project manager delivers the project to the client and the client accepts the project delivery, but the project manager doesn’t assess if the project deliverables satisfy the customer or user. In the example above, if you didn’t check back periodically over five years to assess the results, you would have only launched—but not landed—the project. Launching and landings work in tandem to ensure true success.

A project landing shouldn't create more hurdles. If done correctly, a landing creates greater alignment within the teams on the end results you all desire, and it gives everybody on the team better visibility on how to achieve success.

Key takeaway

Launching your project to the client can be a very big moment for you. You handed over the project to your client and now you can take a step back and breathe. But make sure you land your project, as well. Look over your notes, talk with your team, meet with the client, and remember to return to your intended deliverables and metrics to help you measure success.

2.3.3 Defining success criteria

At the beginning of the project, you defined goals and deliverables that are measurable — meaning that you can determine if they were met. Similarly, you need to **define success criteria** that can also **be measured so you'll know whether they were met**.

The **success criteria**:

- Tell you whether or not the project as a whole was successful.
- They are the specific details of your goals and deliverables that tell you whether you've accomplished what you set out to do.
- They are the standards by which the project will be judged once it's been delivered to stakeholders and customers.

Defining success criteria also **clarifies for your team** what they're trying to accomplish beyond just launching something to users. Is it to increase customer satisfaction with the service so they can continue to purchase more products? Enhance an existing feature to retain customers? Depending on the project, the answers will be different. But, it's important that a team is aligned and working towards a shared goal. Sometimes forcing the conversation and clarifying what the end result looks like can bring to light questions and areas of disagreement.

Remember the measurable part of your SMART goals?

- One of the questions to ask when making your goals measurable is: How will I know when it is accomplished?
- The same question applies to your project: How will you know when it's done?
- Only in this case, you want to ask: How will I know when it's successfully accomplished?

You can **measure to determine your project success in a similar way to measuring a goal**. So go through your project goals and deliverables, review the scope, and identify the measurable aspects of your project. These are going to be any of the metrics used in the goals and deliverables, along with your budget and schedule details. Another thing you'll need to do is **get clarity from stakeholders on the project requirements and expectations**. This is key! There are lots of people involved with any project, and that means lots of ideas about what success looks like to each person. You'll want to ask questions, such as:

- Who ultimately says whether or not the project is successful?
- What criteria will be measured to determine success?
- What's the success of this project based on?

Once you've collected clarifying information, **document and share all** of it so that you, your team, and your stakeholders can refer to it later.

Let's try creating success criteria with the Office Green project. For example, the goal is to increase revenue by 5% by the end of the year. One of the deliverables is a website with a gallery of the different plant selections that are offered.

It's not enough just to make a list of criteria; you need a process for measuring success from start to finish throughout the entire project life cycle. This way, you can make adjustments and ensure success by the time you're ready to land. There are many metrics you can use, and for some products, it will make sense to use more than one. **The metrics you choose should be as closely aligned to your project's goal** as possible. For example, "happiness metrics" measure user attitudes and satisfaction, or perceived ease of use, and you can measure these through surveys.

For the Plant Pals project, we may consider a customer satisfaction rate of 85% within the first three months of launching as a way to measure success. You can also consider **customer adoption and engagement metrics**, along with more business-oriented metrics that track things like sales and growth. **Adoption refers to how the customer uses and adopts a product or service without any issues. Engagement refers to how often or meaningful customer interaction and participation is over time.**

Adoption metrics might include launching a new product to a group of users and having a high amount of them use or adopt it. Engagement metrics might include increasing the daily usage of a design feature or increasing orders and customer interactions. Using the Office Green example, tracking how many customers initially sign up for and use the Plant Pals service is an adoption metric. Tracking how many customers renew their Plant Pals service, post about it, or share feedback are engagement metrics.

Once you've defined the metrics that you'll be measuring, think about how you **track these metrics. Evaluate which tools can help you collect the data** you need to ensure you're staying on track. For example:

- If you're measuring business metrics like revenue, consider tracking that in a spreadsheet or dashboard, where you can easily spot gaps and trends.
- If you're measuring customer satisfaction, you can think of a way to incentivize customers to participate in regular email surveys and create a system to measure their responses when they participate.
- You can also utilize your project management tools to check on efficiency metrics, like what percent of tasks are completed or whether the project is progressing alongside the planned timelines.

It's smart to measure success with your team as a project or product is in progress. For example, you can hold a project review once a month, have team members complete task checklists by certain deadlines, or hold live feedback sessions with your users or customers.

There are many different ways to measure success. The key is to **pick the methods that work best for your success criteria**. It's a good idea that, along with each success criteria on your list, to also include the methods for:

- how success will be measured
- how often it's measured
- who's responsible for measuring it.

Share your success criteria document with your stakeholders and **ask if they agree** with how the project's success will be determined.

It's also a good idea to **have the appropriate stakeholders sign off on the success criteria**. This way, everyone will be clear on who is responsible for which tasks, and you'll all thoroughly understand what the path to success entails. **Keep this documentation visible throughout the duration** of the project and **clearly communicate it with your team** every step of the way. They're the ones who will be attempting to meet all the different requirements, so don't keep them in the dark about what they're supposed to do or how they're supposed to do it.

If done correctly, defining your success criteria should create greater alignment within the team and give everybody better visibility into how to achieve success. Clarity around success metrics also helps teams prioritize which efforts are most impactful to their users.

2.3.4 Tracking and communicating success criteria

We recently covered the topic about launching and landing projects, and now we will turn our focus to ensuring that our landings are successful.

Recall that SMART goals are **Specific**, **Measurable**, **Attainable**, **Relevant**, and **Time-bound** and help keep a project on track for success.

We can also determine the success of a project by the quality of the product, the ability to fulfill the needs of your customers, and the need to meet the expectations of your stakeholders. For this reading, we will discuss these particular success criteria, the metrics we use to track them, and how and why we communicate our findings.

Product quality

The product, or final result, of a project has its own set of attributes that define success. The product attributes that are necessary for the product's success include completeness in features, quality of features, unit cost, usability, etc. The extent that a product is complete will contribute to the product's success. This can apply to any project in which you deliver a product or tangible outcome at the end. To keep us on track for success, we can create a list of product requirements to ensure that you do not miss anything. For example, if the project produces word processing software, you need basic features like text entry, formatting, saving, and printing. Since you require each feature to have a functional word processor by today's standards, you include these features on your checklist.

To measure the success of a product, consider including these metrics on your checklist:

- Track if you implemented the product's priority requirements
- Track and assess the product's number of technical issues or defects
- Measure the percentage of features you delivered or released at the end of the project

What is important to the customers or stakeholders

We have to pay attention to product metrics, but we also have to be mindful of stakeholder and customer additional expectations for features and objectives. In the word processor example, a stakeholder may want to add an additional functionality to easily create tables in a document with text. Additionally, a strategic goal of the organization could be to create word processor software with more collaborative ability than the word processors currently on the market. Each component is necessary in order to meet customer and stakeholder expectations. Think about what needs the project satisfies for your stakeholders or customers. These strategic goals tie back to the business case and the reason you initiated the project in the first place. Often, you can measure the fulfillment of strategic goals via user or customer metrics. Metrics to consider include:

- Evaluating user engagement with the product
- Measuring stakeholder and customer satisfaction via surveys
- Tracking user adoption of the product by using sales data

Document, align, and communicate success

Understanding where we are and where we are going helps the project team determine if they are on track. As you learned in the video on this topic, you need to get clarity from stakeholders on the project requirements and expectations. There are many people involved with any project, and success will look different for each of them. You want to ask questions, such as: Who ultimately says whether or not the project is successful? What criteria will be measured to determine success? What is the success of this project based on? It is best practice to get the key stakeholders or the steering committee to review and approve your success criteria. This becomes a mutual agreement on how all parties define the success of the project.

Key takeaway

Remember, all projects encounter change. All parties must have continuous access and alignment to the success criteria agreed upon to avoid scope creep (uncontrolled change of the project's scope) or failed expectations at the end of the project. It's important to document success criteria upfront and continue to report on it throughout the project. You can [make a copy of this document](#) to help you get alignment.

2.3.5 Using OKRs to evaluate progress

In this lesson, you are learning to define a project's **success criteria**, the measurable attributes project managers use to determine whether or not a project was successful as a whole. This reading will focus on using **OKRs** to evaluate a project's progress.

Objectives and Key Results (OKRs)

You have learned that OKRs—Objectives and Key Results—combine a goal and a metric to determine a measurable outcome. Setting OKRs is a technique that can help project teams define, communicate, and measure shared success criteria.

Communicating and tracking OKRs

Conducting regular check-ins and actively tracking progress with your team can help ensure that objectives are being met and that any issues are resolved as soon as possible.

Share your OKRs with your team. Once you've created OKRs for your project, it's important to communicate them to your team so that everyone knows how to focus and align their efforts. You can do this by sharing a digital document, presenting them in a meeting, or adding them to an internal website. OKRs can help your project team stick to its goals, monitor which are falling short, and be continuously motivated to meet project objectives.

Assign owners. Assign an owner to every key result so that everybody knows who's responsible for what. This helps add clarity and increases accountability.

Measuring progress

Measuring your OKRs is an important part of tracking and sharing your progress. One shortcut to determining the status of a project is to score or grade your OKRs. While scores or grades don't provide a complete assessment of a project's success, they're helpful tools for determining how close you came to achieving your objectives. You can then share your OKR scores with project stakeholders and team members as part of your overall project updates.

Determine how you will score your OKRs. OKRs can be scored in different ways. You can score based on a percentage of the objective completed, the completion of certain milestones, or a scale of 1 to 10, for example. You can also use a "traffic light" scoring approach, where red means you didn't make any progress, yellow means you made some progress, and green means you completed your objective. The simplest approach to scoring OKRs is the "yes/no" method, with "yes" meaning you achieved your objective and "no" meaning you didn't. Using this approach, a key result such as "Launch a new widget marketing campaign" might be graded a 1 or 0 depending on whether it was launched (1) or not (0). A more advanced scoring approach is to grade your key results on a scale. With this method, if a key result was to "Launch six new features" and only three new features were launched, the OKR might be graded 0.5. Generally, if the KR helped you achieve the objective, your OKR should receive a higher score; if it didn't, your OKR should receive a lower score. At Google, OKRs are usually graded on a scale of 0.0 to 1.0, with 1.0 meaning the objective was fully achieved. Each individual key result is graded and then the grades are averaged to determine the score for that OKR. **Set your scoring expectations.** With Google's 0.0–1.0 scale, the expectation is to set ambitious OKRs and aim to achieve an average of at least 0.6 to 0.7 across all OKRs. For OKRs graded according to percentage achieved, the sweet spot is somewhere in the 60–70% range. Scoring lower may mean the team is not achieving what it could be. Scoring higher may mean the aspirational goals are not being set high enough.

Schedule checkpoints. It's important to regularly communicate the status of project OKRs with your team and senior managers. For example, it can be helpful to have monthly check-ins on the progress of OKRs to give both individuals and your team a sense of where they are. Typically, at the end of the quarter, you'll grade each of your OKRs to evaluate how well the team did to achieve its goals.

Key takeaway

OKRs can help you define and measure your project's success criteria. In order for OKRs to be used to effectively meet your project's success criteria, it's important to share them with your team, assign owners to each key result to ensure accountability, measure your OKRs' progress by scoring them, and track your OKRs' progress by scheduling regular check-ins with your team.

To help you get started practicing writing your own OKRs, check out the templates below. To use the templates, click the links below and select "Use Template."

- [OKR Scorecard Template Doc](#)
- [OKR Scorecard Template Sheet](#)

Weekly Challenge 2

1. As a project manager, you're using the SMART criteria to craft goals for your team. During the process, you ask yourself if a goal is aligned to the organization or the company's goals. Which SMART criteria does this question represent?

- Specific
- Measurable
- Attainable
- Relevant
- Time-bound

 **Correct**

2. As project manager, you approve a team member's request to change the order of their tasks because they think it will be more efficient. However, this change disrupts another team member's work process: they need to do two additional tasks that are not related to the project's goal. What is this an example of?

- Internalizing scope
- External scope creep
- Calibrating scope
- Internal scope creep

 **Correct**

3. Consider the following scenario:

The Janco Car Company is about to deliver new cars to its affiliate dealerships. Right before shipping, several dealerships say they cannot receive the cars because of showroom schedules. Janco had not planned for the various dealerships' showroom schedules. The dealerships ask for Janco to reorganize the car shipping schedule, costing Janco hundreds of thousands of dollars.

Which of the following steps could Janco have taken to help prevent scope creep?

- Use legal avenues to make the dealerships alter showroom schedules
- Include product delivery scheduling in the project scope
- Send the shipping schedule to all dealerships after delivery
- Move the cars via airlines to keep the timelines in place

 **Correct**

4. Fill in the blank: Deliverables help project managers, team members, and stakeholders _____ and realize the impact of the project.

- quantify
- compare
- rank
- adjust

 **Correct**

5. As a project manager for an online retailer, you meet with your company's head of customer service and are asked to improve the response time to customer email inquiries by 15 percent by the end of the first quarter. Your team creates email templates for responding to typical questions from customers and produces an end-of-quarter report that shows a 17 percent improvement in response time after your templates were implemented. Which of the following best represents the success criteria for this project?

- A 15 percent improvement in response time at the end of the first quarter
- An end-of-quarter report that shows a 17 percent improvement in response time
- Approval from your company's head of customer service
- Email templates for responding to typical questions from customers

 **Incorrect**

Please review [the video about goals and deliverables](#).

6. Consider the following scenario: The Director of Product requests that the project manager do what they can to finish the project early. However, the Director states that they cannot spend any additional funds.

Using the triple constraint model, what trade-off could the project manager use to meet the Director of Product's request?

- Change the team
- Change the budget
- Change the project goal
- Change the project scope



Correct
Please review [the video that covers the triple constraint model](#).

7. Which two of the following are examples of success criteria? Select all that apply.

- Meet company-wide objective of \$50M in revenues.



- Implement a training service to meet company objectives.

- Deliver training to all appropriate teams to ensure at least 98% of the teams are using the new tool.



- Create a new product feature that will satisfy customers.

8. Which of the following is an adoption metric?

- Double the amount of time participating within an app
- A 35% increase in first-time customers
- An increase in customer satisfaction score
- A 20% increase in the amount of tasks completed



9. As a project manager, your team has been tasked to come up with a new service that increases customer engagement by 4% within one year. The team implements a new service, a website has gone live, catalogs have been printed and delivered, orders have been received, and customer engagement starts to go up. A year later, customer engagement has increased by 2%. What is this an example of?

- A successful project landing
- A successful implementation of OKRs
- A failed project landing
- A failed project launch

 **Correct**

10. Fill in the blank: Objectives and Key Results (OKRs) combine both a goal and a _____ to determine a measurable outcome.

- metric
- vision
- budget
- consensus

 **Correct**

Week 3 : Working Effectively with Stakeholders

Learning Objectives

- Define project roles and responsibilities.
- Complete a stakeholder analysis and explain its significance.
- Utilize RACI charts to define and communicate project team member responsibilities.

3.1 Exploring Project Team Roles and Responsibilities

3.1.1 Choosing a project team

When choosing a team, consider:

- Required roles
- Team size
- Necessary skills
- Availability
- Motivation

In order to decide who does what on a project, we have to consider and outline our needs. **Choosing the right people for a team** is a big task, and one every project manager should take seriously. After all, these are the people who do the work on the project, so we want to **make sure we have the right people lined up**. When **identifying people resources**, we need to **carefully consider the project needs** and use that info to guide our decision-making.

First, a project manager will make a **list of roles that they'll need** on their team to complete each task. In the same way that a project manager is accountable for the overall initiation, planning, execution, and completion of a project, the **person in each role is accountable for specific tasks** within the project life cycle. For example, a home construction project team might include roles on their lists like an architect, a site manager, and multiple construction workers.

Once the tasks are clearly laid out, the project manager **decides how many people they'll need** on their team. This can vary greatly depending on the project size. For **small projects**, a team may only need three or four people to complete the deliverables on time, and for **larger projects**, a team might include dozens. Getting the team size right is important for a bunch of reasons. For example, when there's **a lot of people on a project, communication sometimes becomes difficult**. That makes it more likely for someone to **miss important details**. But if your **team is too small**, there might **not be enough people to finish all the tasks**.

Once you know how many people you need on your team, you have to think about who does what. To decide on the right person for each role, a project manager needs to think carefully

about **skills**. If you're managing the construction of a house, you want to note that the construction workers who are building the frame or installing the drywall have the skills needed to do it properly. It's on the project manager to **ensure that everyone on the team has the right skills to do the job**, but it's also important to remember that **skills can be taught**. If someone doesn't have a certain skill initially, they might still be a great fit for the team. Maybe this person brings a positive attitude and attention to detail—perfectly good reasons to have them on your team. Just keep in mind that if a teammate doesn't have the necessary skills, it's important that they are trained in time so as not to cause project delays.

When **choosing teammates**, a project manager also has to factor in each person's **availability** and whether they'll **feel motivated** to complete their assigned tasks. For example, you might know a fantastic site manager who would make a great asset to the team, but if they're already staffed on another big project, they might not have the time to commit to yours. Or even if they do have the time, they may not feel like this project will give them the visibility they need for a promotion. Motivation is a key ingredient to great work. It's a good idea to pick people who are excited to get involved, but of course, we don't always get to choose our resources. Sometimes another manager or team lead might just assign people to roles. When this happens, it's the project manager's challenge to deliver the best work with what we're given.

Let's check in on our project at Office Green, where we're rolling out a new service. As a project manager, it's up to you to decide who you need on your team. You have to **ask yourself questions** on things like **staff experience, availability, the workspace, team member workload on other projects**, and more. For example:

- Who on the team has office landscaping experience?
- Who's local to the city where the launch will happen?
- Who can be fully dedicated to this project for the next eight weeks?

There's no exact formula for putting together the right team, which makes it a little tricky. Every situation is different and calls for a different set of skills, experience, and perspectives. It can be helpful to look deeper into each task on the project.

Always ask yourself these key questions:

- How many people do I need on my team each step of the way?
- Which team members do I need and when?
- Are those experts already busy on other projects?
- Who makes the final decisions on project resources?

3.1.2 Review: The building blocks of a project dream team

Too big, too small, or just right?

Once you lay the foundation for your project by outlining your goals and expectations, it is time to build your dream team! Though before we can build our dream team, we need to figure out how many people we need. This number will largely depend on the size of the project itself. Complex projects with large divisions of work will usually require larger project teams. Simple projects with straightforward expectations may only require a few people on

the project team. As a project manager, it is your job to help find the right balance based on what is needed.

The right skills and abilities to fill the role

Multiple roles exist in every project. On smaller teams, multiple roles may be filled by one person. To meet the needs of more specialized projects, project managers might require people who have the necessary **technical skills**. Technical skills are the skills specific to the task that needs to be performed. For example, on the Office Green project, necessary technical skills may include indoor landscaping design for the layout of the plants within the offices and floral design of plant arranging.

Technical skills are highly valued, but they are not the only skills that are important for high functioning teams. Interpersonal skills, also known as people skills or soft skills, such as patience and conflict mediation, can help team members. This allows the team to blend their technical expertise with collaborative skills in order to get the job done. When a team applies their interpersonal skills, they can minimize team-related issues.

Problem-solving skills are a must for all team members, especially when it comes to large, complex projects. As a project manager, you will not be able to solve every problem for your team. At some point, they will need to use their own judgment to problem-solve and get the work done.

An underrated skill set for project team members are **leadership skills**. Strong leadership skills help team members navigate organizational boundaries and effectively communicate with stakeholders to generate buy-in.

Who is available?

In projects, the availability of your team is always a big concern. This is especially true in Matrix organizations, where team members have multiple bosses. It is not uncommon to pull a team member onto another project before your project is complete. In a perfect world, you only pick those who can stay on the project for its entire life cycle. You may find that you don't get to pick certain members of your team at all, which is called a pre-assignment. In these cases, the sponsor assigns team members to your project.

Keep in mind that you need to value diversity early on when building your team. On diverse teams, everyone is able to use their unique professional and personal experiences to contribute to a more successful project. Diversity is best leveraged when it is acknowledged and highlighted as an asset. Many people avoid discussing their differences, but if you encourage those conversations, you will find a richer understanding and greater creativity that comes from people working together across identity differences. To do this effectively, it is important to dedicate time early on in the team building process to develop trust between team members. Team members who understand one another are more likely to trust each other and feel safe sharing different points of view or offer a competing perspective. This will also allow them to more easily offer constructive feedback or be supportive if the team dynamics face challenges at any point.

What motivates them?

Be sure to take note of the motivation level of your team members and the impact it may have on your project. Just because a person is pre-assigned to a project, doesn't necessarily mean they have low interest in it, but a person who proactively volunteered for it may have additional motivation to do the work.

As a project manager, it is your responsibility to engage your team and keep them motivated. This is where your influence as a leader is required to keep the team engaged and ready to overcome any obstacles that may appear. Engaging in a respectful manner and maintaining a positive outlook with your team during times of adversity are simple ways to keep your team motivated.

Key takeaway

In summary, team size, skills, availability, and motivation are the building blocks to creating your very own dream team. Always keep in mind that a project manager does not just select dream teams, they create dream teams through collaboration under great leadership. This is the leadership that you will provide as a project manager.

3.1.3 Defining project roles

Before we jump into the specific roles on a project, we want to call out that **some roles aren't fixed**. Sometimes **team members need to adapt and take on more than one role** at a time. This usually happens if the **company is small or resources are limited**. For example, at a small firm, you might be the project manager, designer, and marketer. Whether they're fixed or not, we always have these project roles: **Project sponsors, team members, customers or users, stakeholders, and project manager**.

- **A project sponsor** is the person who is **accountable for the project** and who **ensures the project delivers the agreed upon value** to the business. They play a vital leadership role throughout the process. Sometimes they **fund the project**. The sponsor will probably **communicate directly with managers and key stakeholders**.
- **Team members** are the heart of the operation. They're the **people doing the day to day work and making the project happen**.
- **The customers** are the **people who will get some sort of value** from a successfully landed project. Since the project aims to deliver something useful to the customers, the **customer's needs usually define the project's requirements**. You can think of them as the buyers of the project. In some situations, we have both customers and users for a project, and we need to differentiate between the two. Simply put, **users are the people that ultimately use the product** that your project will produce. To make the distinction nice and clear for you, think of it this way: a software company has created a type of software that allows teams to communicate with each other in an instant message application. The software is purchased by corporation ABC; they are the customer. But the users are everyone within corporation ABC that will be using the instant message application every day.
- **Stakeholders** are **anyone involved in the project**; those who have a vested interest in the project's success. **Primary stakeholders** are people who **expect to**

benefit directly from the project's completion, while **secondary stakeholders** play an intermediary role and are **indirectly impacted by the project**. Secondary stakeholders may be contractors or members of a partner organization, but both primary and secondary stakeholders help project managers define project goals and outcomes.

- **Project manager:** the person who **plans, organizes and oversees the whole project**.

Let's now plug these roles into our Office Green project. Recall that Office Green is a commercial plant company that does interior landscaping and plant design for offices and other commercial businesses. We're launching our new plant service, so if you recall our SMART goal—which must be specific, measurable, attainable, relevant, and time bound—is to roll out a new service to provide office plants to top clients by the end of the year. There's a lot to do when launching a new service. Plants need to be ordered and delivered every few days. New clients will need to be familiarized with Office Green and its procedures. And there will be ongoing updates to the website and app.

- Project Sponsor = Director of Product
- Team Members = Marketing Team
- Team Members = Website designers, landscape designers
- Project Manager = You
- Customers = Buyers
- Users = Employees

For Office Green's launch, our **project sponsor** is the **Director of Product**. They **approve the project's budget** and **ensure that everything stays aligned to the vision**, which in this case, is that inexpensive and easy-to-maintain live plants are provided in order to improve the employees' work environments.

The team's made up of people from across departments, and they're all working together to support the project. For example, the marketing department has assigned some people to the team because they'll need to tell customers about this new service. On this project, the landscape designer is also the website designer. This is an example of where a team member plays more than one role. And you? You're the project manager. You're the one managing the information, people, and schedule to carry this project to a successful landing.

Our **customers** for this project are **buyers** at offices who might be interested in Office Green's services, such as **the office managers** or **procurement teams**. However, the **users** are the **employees who work at the offices** because they're the ones who enjoy the plants.

Secondary stakeholders won't play active roles throughout all phases of the project but still **need to be informed** as they are a component of what the project needs to succeed. For example, these include Office Green's **investors**, who are helping to fund the new service launch, and the Office Green **receptionist**, who will answer a lot of customer questions about the new service once it's launched.

3.1.4 Essential project roles

In this lesson, you are learning to define project roles and responsibilities. Let's now build on what you have learned about building your project team and focus on how to further identify the core roles and responsibilities that are critical to any project.

The project manager

Although all team members are responsible for their individual parts of the project, the project manager is responsible for the overall success of the team, and ultimately, the project as a whole. A project manager understands that paying close attention to team dynamics is essential to successfully completing a project, and they use team-building techniques, motivation, influencing, decision-making, and coaching skills, to keep their teams strong.

Project managers integrate all project work by developing the project management plan, directing the work, documenting reports, controlling change, and monitoring quality.

In addition, project managers are responsible for balancing the scope, schedule, and cost of a project by managing engagement with stakeholders. When managing engagement with stakeholders, project managers rely on strong communication skills, political and cultural awareness, negotiation, trust-building, and conflict management skills.

Stakeholders

Have you ever heard the phrase “the stakes are high”? When we talk about “stakes,” we are referring to the important parts of a business, situation, or project that might be at risk if something goes wrong. To hold stake in a business, situation, or project means you are invested in its success. There will often be several parties that will hold stake in the outcome of a project. Each group’s level of investment will differ based on how the outcome of the project may impact them. Stakeholders are often divided into two groups: **primary stakeholders**, also known as key stakeholders, and **secondary stakeholders**. A primary stakeholder is directly affected by the outcome of the project, while a secondary stakeholder is indirectly affected by the outcome of the project.

Primary stakeholders usually include team members, senior leaders, and customers. For example, imagine that you are a project manager for a construction company that is commissioned to build out a new event space for a local catering company. On this project, the owners of the catering company would be primary stakeholders since they are paying for the project.

Another primary stakeholder could be the CEO of your construction company. If the CEO likes to be directly involved with projects for local businesses like the catering company, that would make them a primary stakeholder.

An example of a secondary stakeholder might be the project’s point of contact in legal. While the project outcome might not affect them directly, the project itself would impact their work when they process the contract. Each project will have a different set of stakeholders, which is why it’s important for the project manager to know who they are, what they need, and how to communicate with them.

Project team members

Every successful team needs strong leadership and membership, and project management is no exception! Project team members are also considered primary stakeholders, since they play a crucial role in getting the job done. Your team members will vary depending on the type, complexity, and size of the project. It's important to consider these variables as you select your project team and begin to work with them. Remember that choosing teammates with the right technical skills and interpersonal skills will be valuable as you work to meet your project goals. If you are not able to select your project team, be sure to champion diversity and build trust to create harmony within the team.

Sponsor

The **project sponsor** is another primary stakeholder. A sponsor initiates the project and is responsible for presenting a business case for its existence, signing the project charter, and releasing resources to the project manager. The sponsor is very important to the project, so it's critical to communicate with them frequently throughout all project phases. In our construction company example, the CEO could also be the project sponsor.

Key takeaway

Although the roles involved in each project will vary, all projects will include a project manager and primary stakeholders who are directly impacted by the project's outcome, such as team members, senior leaders, the customer, and the project sponsor. Secondary stakeholders, whose work less directly impacts the project, may also play a role. Keep these roles in mind as we take a closer look at the importance of stakeholders.

3.1.5 Identify: Project role responsibilities

Project manager	Project sponsor	Project team member
Monitor quality of work	Approve budget and resources	Contribute to individual project objectives
Scope accurately	Advise on key business decisions	Work independently and collaboratively
Use team-building techniques	Advocate for alignment with senior management	Possess specific expertise
Plans and directs project work		
Manage the budget		
Manage the timeline		

3.2 Evaluating Stakeholders

3.2.1 Completing a stakeholder analysis

As a quick refresher:

- **primary stakeholders** are people who will **benefit directly from the project's success**
- **secondary stakeholders** are **indirectly impacted by the project's success**.

Having all these different people involved on a project can get confusing, and that's where a **stakeholder analysis** comes in handy. This is a **visual representation of all the stakeholders**. It helps you **avoid surprises, build necessary partnerships, and ensure you're involving the right people at the right time**.

When done well, your **stakeholder analysis** helps you see all the opportunities for success and the **potential risks**, it illustrates which stakeholders are taking on which **responsibilities**, and it can help you include the right people in important **conversations**, which is key to getting the support you need throughout the project.

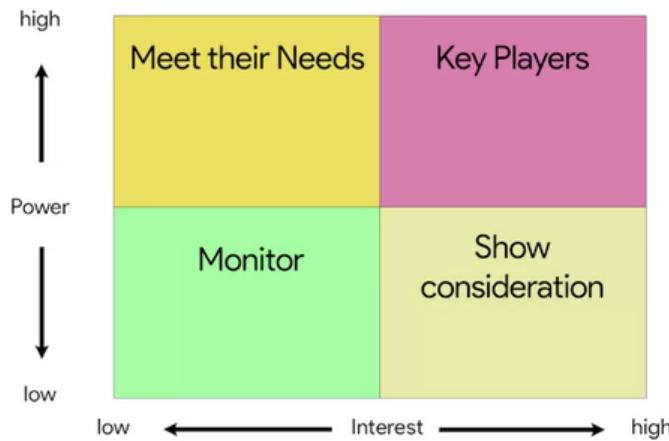
There are **three key steps to kicking off a stakeholder analysis**.

- Make a list of all the stakeholders that the project impacts.
- Determine the level of interest and influence for each stakeholder.
- Assess their ability to participate, and find ways to involve them.

In the second step, we talk about influence and interests.

- **Influence** measures how much power a stakeholder has and how much the stakeholder's actions affect the project outcome. In our Office Green example, the Director of Product, who first initiated the project and oversees new products and services, has a huge amount of influence, while the vendor providing the greenery has less influence.
- **Interest** is pretty much what it sounds like: How much are the needs of the stakeholder affected by the project operations and outcomes? For example, Office Green's human resources department may not have as much interest in the product launch as a sales department does.

The **power grid** is a super useful two-by-two grid used for **conducting a stakeholder analysis**. We use the power grid to assign each stakeholder's level of importance to the project, measuring their interest and influence. The position of the stakeholder on the grid usually determines their active role in the project. The higher the interest and influence, the more important the stakeholder is to the project's success. Without their support, it's unlikely that the project will successfully land. These people are our key stakeholders. Now that you have a better idea of each stakeholder's position on the team, you can plan how to best manage everyone.



There are **four different techniques** you can use for managing stakeholders.

- The first group of stakeholders are the **key players**, or **key stakeholders**. You'll find these people in the **top right corner of the grid**. To best manage key stakeholders, you'll want to **closely partner with them to reach the desired outcomes**.
- You'll find **stakeholders with higher influence but lower interest** in the **top left corner of the grid**. To manage these stakeholders, you'll want to **consult with them and meet their needs**. Their **opinions and input are important** to the project. The Director of Product has high influence, but may not be vested into day-to-day activities, and therefore will have a lower interest.
- Stakeholders with **lower influence but high interest** are in the **right bottom corner of the grid**. For these stakeholders, you'll want to **show consideration for them by keeping them up-to-date on the project**. It's unlikely they'll need a say in what's going on, but keeping them informed is important. For example, the customer success team may have lower influence but high interest since they'll work directly with clients on the new product.
- Last up, we have stakeholders with **low influence and low interest**. You'll find these in the **bottom left corner**. They're **the least important of the stakeholders**, but this doesn't mean that they don't matter. It might just be that for this particular project, they aren't as integral. So for this project, you mainly want to monitor them, keeping them in the know.

Creating a grid like this is an effective way to **track who should be communicated with and when**. This grid here is an example of how that might play out, depending on the project and the stakeholders. You may also want to **create a steering committee** made up of a **high influence and high interest stakeholders**. These people will be the most senior decision-making body on any project. They have the authority to make changes to budget and approve updates to timeline or scope. **The project manager isn't a member of the committee**, but they're responsible for bringing the right project information to the steering committee so that decisions can be quickly made.

How you **engage your stakeholders** from this point on depends on your particular situation. There are different ways to involve each stakeholder, and you have to be strategic to get helpful and relevant input from the right people at the right time. You'll want to meet with some stakeholders every single day, and others you'll just send periodic updates to.

Stakeholder buy-in is the process of involving these people in decision-making to hopefully reach a broader consensus on the organization's future. To get stakeholders to buy in on the project, you'll have to **pay particular attention to your high-impact stakeholders** and **make sure they feel looped in**. You'll want to explain to them how the project will help them achieve their goals, and you want to have their support later on if any issues come up.

Here are some important things to keep in mind when **communicating with stakeholders**:

- If you have **one main stakeholder**, that stakeholder is likely to be **highly influential and needs constant communication**.
- If you're on a larger project with **numerous stakeholders**, they won't be quite as involved in the day-to-day tasks. For stakeholders who need time to make decisions about the project, over-communicate early on. For example, hold frequent meetings and send daily end-of-day progress emails. This way, they have enough time to weigh the options and make decisions. **Think about the level of project details each stakeholder needs**. You don't want to spend time diving deep with stakeholders that just need a project summary. For example, the facilities team that delivers the product doesn't need daily updates on vendor pricing or website issues. On the flip side, do spend time updating key members that need frequent updates. The sales team will need to know pricing and availability changes, so a weekly check-in might make sense here.

3.2.2 Prioritizing stakeholders and generating their buy-in

In this lesson, you are learning to complete a stakeholder analysis and explain its significance. Let's focus here on how to prioritize the various types of stakeholders that can exist on a project, generate stakeholder buy-in, and manage their expectations.

Conducting a stakeholder analysis

Stakeholders are an essential part of any project. A project manager's ability to balance stakeholder requirements, get their buy-in, and understand when and how to involve them is key to successfully fulfilling a project.

It is key to keep stakeholders organized in order to understand when and how to involve them at the right time. In an earlier video, we introduced the **stakeholder analysis**, a useful tool that project managers use to understand stakeholders' needs and help minimize hiccups during your project life cycle.

Let's review the key steps in the stakeholder analysis:

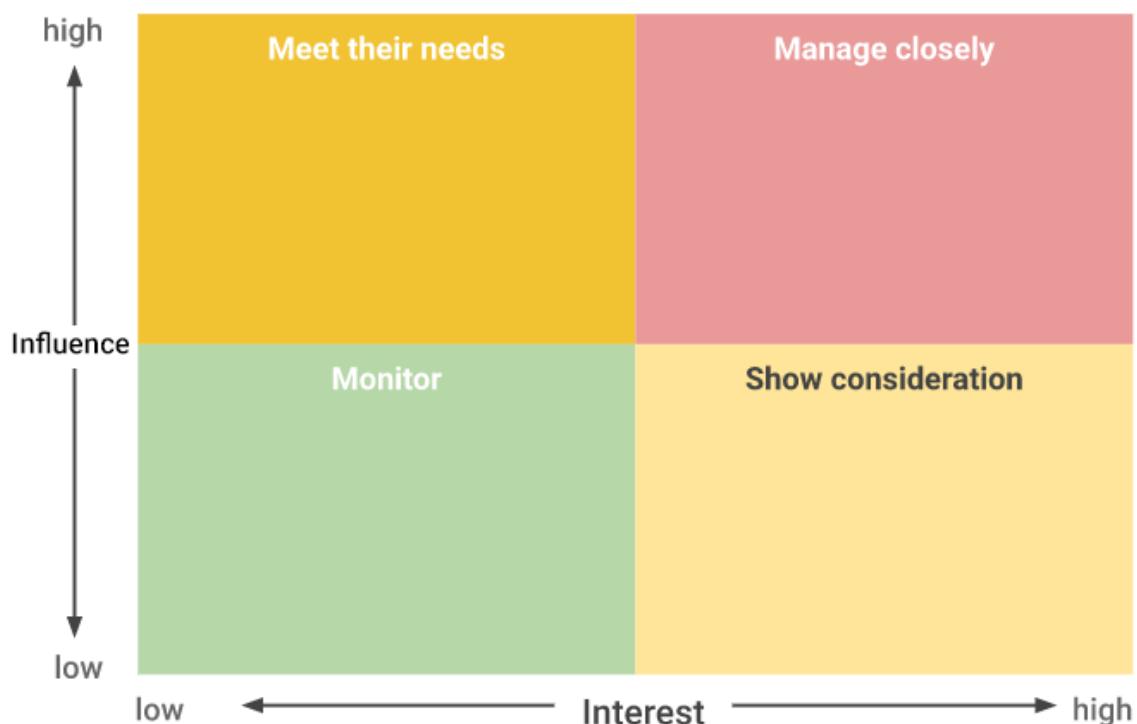
1. Make a list of all the stakeholders the project impacts. When generating this list, ask yourself: Who is invested in the project? Who is impacted by this project? Who contributes to this project?
2. Determine the level of interest and influence for each stakeholder—this step helps you determine who your key stakeholders are. The higher the level of interest and influence, the more important it will be to prioritize their needs throughout the project.
3. Assess stakeholders' ability to participate and then find ways to involve them. Various types of projects will yield various types of stakeholders—some will be **active stakeholders** with more opinions and touchpoints and others will be **passive**

stakeholders, preferring only high-level updates and not involved in the day-to-day. That said, just because a stakeholder does not participate as often as others does not mean they are not important. There are lots of factors that will play a role in determining a stakeholder's ability to participate in a project, like physical distance from the project and their existing workload.

Pro tip: You might want to form a **steering committee** during some projects. A steering committee is a collection of key stakeholders who have a high level of power and interest in a project. A steering committee can influence multiple departments within the organization, which means that they have the potential to release a greater number of resources to the project manager.

Visualizing your analysis

A **power grid** shows stakeholder interest *in* the project versus their influence *over* the project. This four-quadrant tool helps project managers evaluate how to manage their stakeholders. It is used to determine the appropriate level of engagement required by the project team needed to gain the stakeholders' trust and buy-in. The upper half of the grid represents higher influence, and the lower half of the grid represents lower influence. Meanwhile, the left half of the grid represents lower interest, and the right half of the grid represents higher interest. With that in mind, you'll find the upper left quadrant to be labeled "meets their needs," the upper right quadrant "manage closely," the bottom left quadrant is labeled "monitor," and the bottom right quadrant is labeled "show consideration."



Take the time at the start of the project to establish your stakeholder approach. List the stakeholders and then place them into the appropriate places on the grid. Being able to visualize their placement will help you manage communications and expectations. Having a

quick reference tool to drive your communication actions will also allow you to have the ability to spend more time doing other tasks on your project.

Pro tip: While these tools help organize information, they do not necessarily make the difference between successful and unsuccessful stakeholder engagement. What will make for successful stakeholder engagement is the project manager's ability to know their stakeholders' motivations and inspirations. This takes time, interpersonal skills, and insight into the organization's internal political workings. Remember, each project is different, and your project may need tweaks along the way as you grow as a project manager. Making necessary changes means you are doing something right. Just make sure to check in and ensure that you are well on track, engaging your stakeholders successfully, and delivering on your project!

Generating stakeholder buy-in

Once you organize and assess your stakeholders, it is time to start making some decisions on whose buy-in is absolutely necessary for success, whose requirements deserve the most attention, and what level of communication each stakeholder will require.

Gaining key stakeholder buy-in is essential to ensuring that your project is not deprioritized or deprived of resources.

Tips for gaining key stakeholder buy-in include:

- Clearly mapping the work of the project to the goals of the stakeholder.
- Describing how the project aligns with the goals of the stakeholder's department or team.
- Listening to feedback from the stakeholder and finding ways to incorporate their feedback into the project's charter where appropriate.

Manage your stakeholders' expectations by presenting a realistic view of your team's abilities. Do not over-promise and under-deliver!

Optional reading

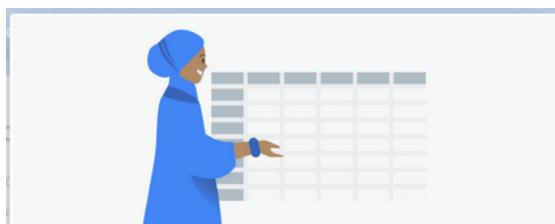
This article, titled [Roll Call: We Asked the Project Management Community: What Steps Do You Take To Identify and Prioritize All Stakeholders at the Start of a Project?](#), describes additional strategies for identifying stakeholders to further increase your understanding.

3.2.3 Explore: Stakeholder interview

Suggested questions for stakeholders

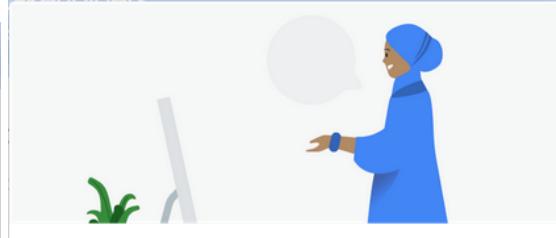
- What are your most important priorities/goals?
- How will this initiative/project support you and your most important priorities?
- What role would you like to play within this initiative/project?
- Here's how I plan to keep people informed; does that work for you?
- What can I clarify for you?
- What are your expectations? What would you like for the project to accomplish?

- What would success look like for you?
- Who else do you recommend I reach out to about this initiative?
- What information or insights do you have that might be challenging for me to find?
- Where do you see me getting support for this initiative? Facing resistance?
- What additional thoughts/questions do you have?



What are your expectations for the project?

Director of Product: I'm busy with too many projects to be involved day-to-day. But beyond our main project goals, I hope it sets us up to expand to more cities and helps fund new initiatives.



And where do you think I'll get support? Meet resistance?

Director of Product: We have some excited customers—they've been asking for this for a while. Our investors are supportive, but more cautious. You should meet with our Landscape Designer. I know they're on your team, but they might have some concerns.



What can I clarify for you? Do you have concerns?

Landscape/Web Designer: I understand how Plant Pals supports our overall business goals, but I worry how my role might change if Office Green shifts from general landscaping to potted plants.



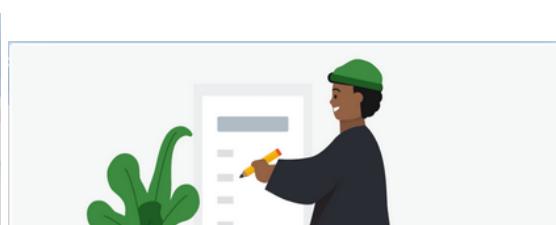
What does project success mean to you?

Landscape/Web Designer: Ideally, Plant Pals will help us expand our business without neglecting our core offerings. I've been at Office Green since the start; I want it to succeed, but I also want to keep doing the work I love.



Can you share any insights from your experience with customers?

Receptionist: I know a lot of our customers are enthusiastic about the new service, but they don't always respond well to change. Make sure you communicate well, and be ready to support them after launch. I can help with that.



How would you like to be involved in this project?

Receptionist: I know you don't need me for day-to-day planning, but I am really interested in this new part of the business. Plus, I'm sure our customers will have a lot of questions, so I want to understand how Plant Pals works.

3.2.4 Activity: Complete a stakeholder analysis and power grid

Activity Overview

In this activity you will complete a stakeholder analysis and power grid.

As a project manager, it's important to understand how each stakeholder relates to your project. Completing a stakeholder analysis and power grid allows you to determine each stakeholder's influence and potential impact on a project, which is crucial to managing communications and expectations.

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the scenario below. Then complete the step-by-step instructions.

You are the project manager at Office Green, a commercial landscaping company that specializes in plants and greenery for offices and other businesses. The company is getting ready to introduce its new Plant Pals service, and you will manage the launch. You and your team need to maintain trust and generate buy-in from your stakeholders. Some of your stakeholders include:

- **Director of Product:** The Director of Product is the project sponsor. As the sponsor, they fully support the project, sign off on high-level decisions, and sometimes act as a resource for the team. They are deeply invested in the outcome of the project, but less involved with its day-to-day operations.
- **Landscape Designer/Web Designer:** This person has two roles at Office Green, and within the Plant Pals project. In addition to their web design skills and knowledge of plants, they have strong relationships with a range of people across the company. The Plant Pals project could affect their role as Landscape Designer if it results in a pivot toward new services. If they don't want their role to change, it could be harder to get their buy-in.
- **Existing clients and their employees:** The core customers for this product launch are Office Green's existing clients and their employees. Their feedback can help Office Green improve the customer experience for the new service. Depending on their needs, some clients will be very interested in Plant Pals, while others will be less so. Lower-interest clients are unlikely to resist the project unless it impacts the existing product line.
- **Office Green's investors:** The investors support Office Green financially, so the company wants to keep them happy. Likewise, because Office Green's performance affects their investments, the investors want Plant Pals to succeed. However, they will not be directly involved in the project and it will not affect them before launch. They are therefore unlikely to oppose the project at this stage.
- **Office Green's receptionist:** The receptionist will not be directly involved with the Plant Pals project. They will need to answer customer questions about the service

later on, but don't need to know many details until closer to launch. They have no major concerns about the project at this stage.

Step-By-Step Instructions

Part 1 - Understanding stakeholders with a stakeholder analysis

Step 1: Access the template

To use the template for this course item, click the link below and select "Use Template."

Link to template: [Stakeholder analysis and power grid](#)

Step 2: Identify stakeholders

Start with the **Understanding Stakeholders** table on the first slide of the template. This is where you will organize your information. First, identify the stakeholders from the Office Green scenario (e.g., Director of Product, Landscape Designer/Web Designer, etc.) and write their titles in the **Stakeholder** column of the table.

Step 3: Determine stakeholder roles

What roles do your stakeholders play in the project? Write down each team member's role in the **Role** column. Select from the following options when determining project roles:

- Project sponsor
- Project team member
- Office Green employee
- Office Green customer
- Secondary stakeholder

Step 4: Determine stakeholder involvement

How will each stakeholder participate in the project? What resources do they have that can help project success? Consider each stakeholder's involvement in the project, as well as any tools (software, hardware, etc.), knowledge, or relationships that could be helpful. Make note of these activities and assets in the **Involvement** column.

Step 5: Determine the impact on your stakeholders

How will the project outcomes affect the needs of each stakeholder? Do you expect any resistance that could affect their buy-in? Record this information in the **Impact** column.

Step 6: Determine each stakeholder's level of power or influence

How much influence does each stakeholder have over the project? Consider the information you added to the **Involvement** and **Impact** columns. Then record each stakeholder's level of power or influence as high (H), medium (M), or low (L) in the **Power or Influence** column.

Note: You should gauge each stakeholder's level of influence on this project, not within Office Green in general.

Step 7: Determine each stakeholder's level of interest

How involved is each stakeholder in the project on a daily basis? How much will the project impact the needs of each stakeholder? Estimate each stakeholder's level of interest in the project at this stage, considering your notes from the **Involvement** and **Impact** columns. Then indicate high (H), medium (M), or low (L) in the **Interest** column.

Be sure to consider interest in project outcomes and interest in day-to-day operations. If a stakeholder is interested in both, their overall interest level is likely high. If neither, their interest could be low. If they are interested in one, but not the other, a medium rating might be appropriate.

Leave the **Engagement** column blank for now. You will return to it once you have completed the power grid.

Part 2 - Prioritizing stakeholders in a power grid

Step 1: Place stakeholders in the power grid

Now go to the second slide of the template: **Prioritizing Stakeholders (power grid)**. Consider your power or influence ratings from the stakeholder analysis. Then drag the box containing each stakeholder's name to the appropriate place in the power grid.

High-interest, high-power stakeholders should go toward the upper-right corner. Low-interest, low-power stakeholders go toward the lower-left corner, and so forth. You can place stakeholders anywhere on the power grid—even between quadrants. For example, a stakeholder with a medium level of interest would straddle the high and low interest quadrants.

Note: Consult slides 3-5 for a demonstration of how to place your stakeholders.

Step 2: Determine how to engage with stakeholders

Now that you've placed your stakeholders in the grid, go back to the **Engagement** column in the stakeholder analysis table. Think about where each stakeholder falls in the grid: monitor, show consideration, keep satisfied, or manage closely.

Based on this information, determine how often you should communicate with each stakeholder and what form that communication should take (e.g. semi-regular consultations, frequent updates, etc.). Depending on their role or resources, you might communicate with them daily, regularly, or rarely. Record your answers in the **Engagement** column.

Assessment of Exemplar

Compare the exemplar to your completed stakeholder analysis and power grid. Review your work using each of the criteria in the exemplar. What did you do well? Where can you

improve? Use your answers to these questions to guide you as you continue to progress through the course.

Note: Some of the information in your stakeholder analysis and power grid may differ from these exemplars. Some variation is to be expected.

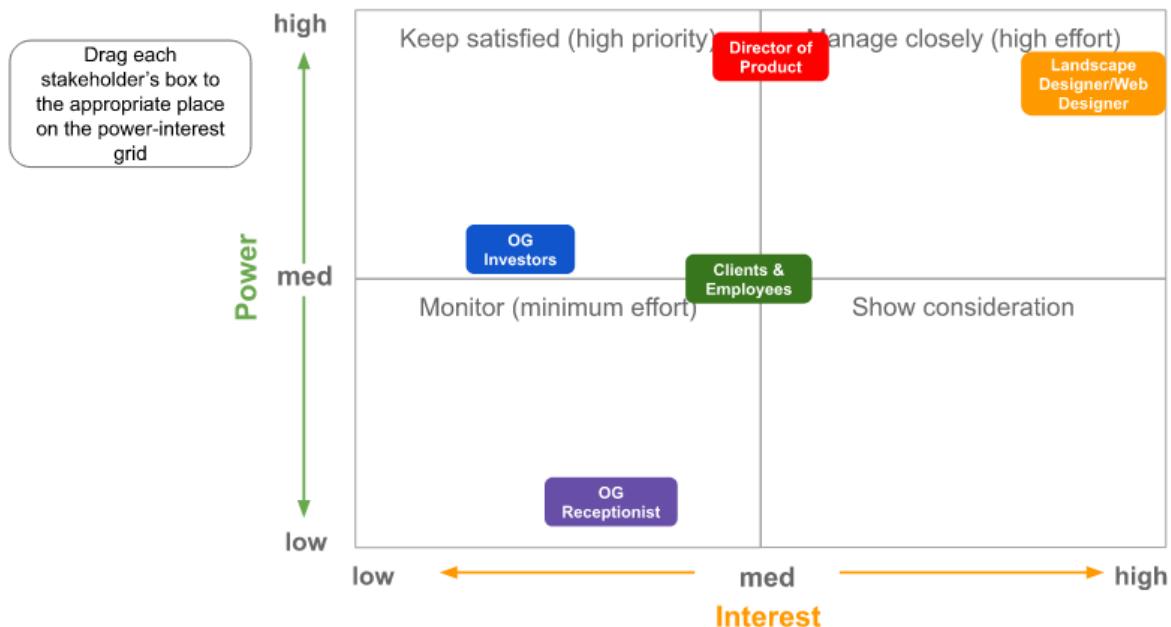
Let's review the stakeholder analysis table:

- The **Stakeholder** column includes the titles of the five stakeholders (and stakeholder groups) from the scenario.
- Each stakeholder's role is in the **Role** column.
- Each stakeholder's involvement (including helpful tools, knowledge, or relationships) is recorded in the **Involvement** column.
- The project's impact on each stakeholder's needs (along with any potential resistance) is described in the **Impact** column.
- Each stakeholder's level of power or influence is classified as high (H), medium (M), or low (L) in the **Power or Influence** column.
- Each stakeholder's level of interest is classified as high (H), medium (M), or low (L) in the **Interest** column.
- The level and type of engagement determined for each stakeholder is recorded in the **Engagement** column.

Understanding stakeholders (stakeholder analysis)

Stakeholder	Role (Related to project)	Involvement	Impact	Power or Influence (H/M/L)	Interest (H/M/L)	Engagement
Director of Product	Project sponsor	Makes high-level decisions; serves as team resource	Wants the project to succeed. No resistance.	H	M	Communicate regularly, but not daily. Ask questions and give updates.
Landscape Designer/Web Designer	Project team member	Knowledge of website design and plants; strong relationships with OG employees	Invested in the project as a team member. Possible resistance if Landscape Designer role is affected.	H	H	Communicate daily as project team member
Existing Clients and Employees	Office Green customer	Can give feedback on the customer experience	Some highly interested; others less so. Resistance only if Plant Pals affects main product line.	M	M	Communicate as needed to inform and get feedback.
Office Green's Investors	Secondary stakeholder	Financial support	Little impact at present. Project could affect their investment if it affects Office Green's performance.	M	L	Not directly involved. Keep updated on progress and performance.
Office Green Receptionist	Office Green employee	Answers questions about the service after launch	Little impact on their role. No resistance.	L	L	Not directly involved, but should be updated before launch

Prioritizing stakeholders (power grid)

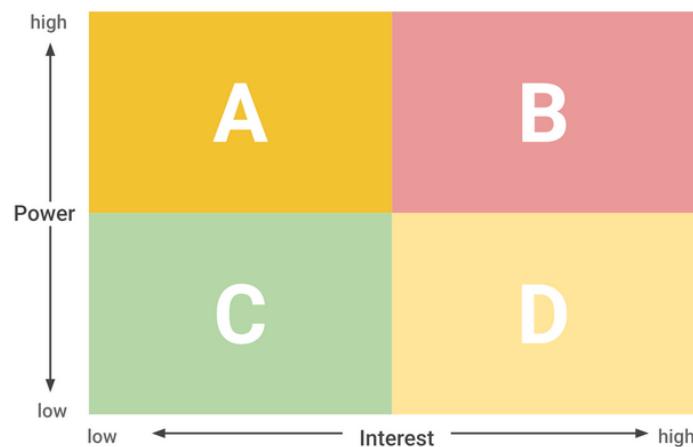


Let's review the power grid:

- As the project sponsor, the **Director of Product** has a **high** level of influence on the project. They are invested in the project's success, but not involved on a day-to-day basis, so their interest is **medium**. You should communicate with them regularly, but not daily, to ensure they are satisfied with project progress.
- The **Landscape Designer/Web Designer** has a **high** level of both influence and interest, which means you should manage them closely. You should communicate with them daily to discuss project tasks and to ensure you have their buy-in. If you have them on your side, they can help you manage relationships with other Office Green employees.
- Existing clients and their employees** are the core customer base for Plant Pals, so you need to make sure you're building something they want to buy. Their feedback can help you measure project success, but you don't need to communicate with them frequently. Occasional check-ins to gauge their satisfaction are appropriate. This is a large group of people with varying priorities and concerns, so their interest and influence are both marked as **medium**.
- Office Green's investors** will not be directly involved in the project, so their interest in daily operations is **low**. However, their influence level is **medium**, since you need to protect their investment to keep their financial support. Giving them periodic updates on project milestones and performance would be appropriate.
- The **Office Green receptionist**'s influence and interest in the project are both relatively **low**. You don't need to communicate with them often until the project nears completion. They are not part of the project team, and you do not need to discuss the details with them until later in the process.

Test your knowledge: Evaluating stakeholders

1. Imagine you are a project manager for a healthcare company. When building a team for a new research project, you create a power grid to help you figure out which stakeholders to prioritize. Which box in the grid represents the stakeholders who are the key players on your team?



- Box D (low influence, high interest)
- Box C (low influence, low interest)
- Box A (high influence, low interest)
- Box B (high influence, high interest)

 **Correct**

As a project manager, you should prioritize the stakeholders with higher interest and influence on your team. You should closely partner with key stakeholders to reach the desired outcomes.

2. What is the correct order of tasks in a stakeholder analysis?

- Determine each stakeholder's level of interest and influence, list all the stakeholders the project impacts, and find ways to involve them.
- Find ways to involve each stakeholder, list all the stakeholders the project impacts, and determine their level of interest and influence.
- List all the stakeholders the project impacts, determine their level of interest and influence, and find ways to involve them.
- List all the stakeholders the project impacts, find ways to involve them, and determine their level of interest and influence.

 **Correct**

First, a project manager needs to determine who their stakeholders are and understand their level of influence and interest. Then, a project manager needs to decide how to involve them in a project.

3. What does stakeholder analysis enable project managers to do? Select all that apply.

- Select more impactful projects
- Avoid potential risks down the road

 **Correct**

Stakeholder analysis can help you know what to expect as the project unfolds. It can also help you build partnerships and include the right people in important conversations.

- Accurately predict project outcomes
- Build necessary partnerships

 **Correct**

Stakeholder analysis tells you which people to include in important conversations. This is key to getting the support you need throughout the project. It also helps you know what to expect so you can avoid surprises down the road.

4. What is it called when a project manager involves stakeholders in decision-making to reach a broader consensus?

- Stakeholder buy-in
- Stakeholder analysis
- Stakeholder identification
- Stakeholder mapping

 **Correct**

Stakeholder buy-in helps stakeholders feel invested in the outcome of a project by involving them in decision-making.

3.3 Assigning Project Team Roles and Responsibilities

3.3.1 Elements of a RACI chart

A **RACI chart** helps to **define roles and responsibilities for individuals or teams** to ensure work gets done efficiently. It creates clear roles and gives direction for each team member. There are **four types of participation included** in a RACI chart. These are: **responsible, accountable, consulted, and informed**.

- **Responsible** refers to those doing the work to complete the task.
- **Accountable** refers to those making sure the work gets done.
- **Consulted** includes those giving feedback, like subject matter experts or decision-makers.
- **Informed**, which includes those just needing to know the final decisions or that a task is complete.



RACI matrix example

█ Responsible
█ Accountable
 █ Consulted
█ Informed

		I	I	C	I	R
Calendar icon		I	I	C	I	R
Dollar sign icon	A	R	I	C	I	
Document icon	A	R	I	I	I	
Box icon	A	C	R	I	C	

When **creating your RACI chart**, you need to **write down each task or deliverable** for your project, and then **assign it the appropriate role for each stakeholder**. To do this, first think about **who's involved in the project**. Write the roles or people's names in a row across the top of your chart. **Pro-tip: use roles rather than names** if some people might take on more than one role.

Next, **write down the tasks or deliverables** in a column on the left. Try not to get too specific here. You want the **chart to be simple and easy to read**. After that, go through each task and deliverable and ask:

- Who's responsible for doing this?
- Who's accountable if it doesn't get done?
- Who will have strong opinions to add, and therefore, should be consulted about how this gets done?
- Who needs to be informed of the progress or decisions made about this?

Assign the letters R, A, C, and I based on your answers.

For example, as a project manager on Office Green's new service launch, one of your tasks is to create different price points for different packages and delivery frequencies. **The Head of Finance will be accountable** because the project needs to stay in budget and make money, but it's the **Financial Analyst who's responsible**, as they're the person doing the work in determining optimal pricing. **The Director of Product will be consulted** on the matter as they oversee the product offerings. And finally, **team members**, like those on the sales team, **need to be informed** of the final pricing.

It's possible there are several roles that fall into the "informed" and "consulted" categories. One thing that will **always remain constant** is there will never be more than one person designated as **"accountable."** This prevents confusion, because having one person accountable clearly defines ownership. However, the same person that is "accountable" may also be "responsible."

There are several other factors that can **cause role confusion**. For example:

- There might be **unbalanced workloads**, which means some people might be doing more work or less work than others on the team.
- There could be an **unclear hierarchy** when people aren't sure who to seek help from if a task doesn't get done or unclear ownership of decisions where people aren't sure who makes the final call on a project.
- **Overlapping work**. This is when teams or individuals feel that they're responsible for the same work. When this happens, things can get confusing fast.
- **Excessive communication**. While communication is usually a good thing, too much communication can actually make things more complicated. It can cause information overload where people don't know what to pay attention to, and so they miss something important.

3.3.2 Building out a RACI chart

A **RACI chart** can be an extremely effective way to define project roles, give direction to each team member and stakeholder, and ensure work gets done efficiently. Having a RACI chart available throughout the duration of your project as a quick visual can be invaluable. In this reading, we will cover the function of a RACI chart and its components and explore how project managers use RACI charts to define and document project roles and responsibilities.

Elements of a RACI chart

A RACI chart creates clear roles and gives direction to each team member and stakeholder. Over your career, you may hear a RACI chart referred to as a Responsibility Assignment Matrix (RAM), RACI diagram, or RACI matrix. The ultimate goal of this chart is to clarify each person's role on your project.

First, let's break down each of the roles people can be assigned:

R: Responsible: who gets the work done

A: Accountable: who makes sure the work is done

C: Consulted: who gives input or feedback on work

I: Informed: who needs to know the outcome

Note that RACI charts can be organized in different ways, depending on personal preference, number of tasks being assigned, and number of people involved. In the previous video, we showed you one RACI chart format. The template below shows another way a typical RACI chart might be organized.

Let's further examine each of the roles and how to determine which team member should be assigned to which role.

R: Responsible	Assigned to complete the task or deliverable			
A: Accountable	Has final decision-making authority and accountability for completion (only one per task)			
C: Consulted	Must be consulted before a decision or action is taken			
I: Informed	Must be informed after a decision or action is taken			
Task	List Roles			
	R	A	C	I
Task 1				
Task 2				
Task 3				
Task 4				

Responsible

Individuals who are assigned the “responsible” role for a task are the ones who are actually doing the work to complete the task. Every task needs at least one responsible party. It’s a best practice to try to limit the number of team members assigned to a task’s responsible role, but in some cases, you may have more than one.

A couple of questions to ask yourself when determining which person or people should be placed in the responsible role for a given task are:

- What department does the work fall under?
- Who will perform the work?

It is helpful to evaluate the people on your team to determine the role that suits them. Remember that you may need to list roles rather than names, if some people take on more than one role.

Let’s dig deeper into our example with Office Green. Our task is to develop price points for the project, and the Financial Analyst will complete the work for this task. Therefore, we will list “Financial Analyst” in the responsible role for this task in the RACI chart.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst			

Accountable

The “accountable” person is responsible for making sure the task gets done. It is important to have only one individual accountable for each task. This helps clarify ownership of the task. The accountable person ultimately has the authority to approve the deliverable of the responsible party.

In order to determine who should be tagged as the accountable team member, consider:

- Who will delegate the task to be completed?
- Who will review the work to determine if the task is complete?

You may encounter a situation where the responsible party is also accountable, but where possible, it is helpful to separate these roles. Ensuring that accountability is not shared ensures that there is no confusion on who the ownership belongs to.

Continuing with our Office Green example, you have assigned the “accountable” role to the Head of Finance. The Head of Finance has to make sure the project stays in budget and makes a profit, so they have the ultimate authority over the price points for the product. Therefore, they will need to approve the Financial Analyst’s work on the task.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst	Head of Finance		

Consulted

Team members or stakeholders who are placed in the “consulted” role have useful information to help complete the task. There is no maximum or minimum number of people who can be assigned a “consulted” role, but it’s important that each person has a reason for being there.

Here are a few ways you can help identify who is appropriate for the role:

- Who will the task impact?
- Who will have input or feedback for the responsible person to help the work be completed?
- Who are the subject matter experts (SMEs) for the task?

The consulted people will be in frequent, two-way communication with the responsible party, so it is key to make sure that the right people are in this role to help accomplish the task efficiently and correctly.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst	Head of Finance	Director of Product	

Back to the project at Office Green, we’ve got a “responsible” Financial Analyst and an “accountable” Head of Finance. Who else would need to provide input on the product’s price points? Whose decisions and feedback will directly affect the task? The Director of Product will need to be consulted on the matter, as they oversee all product offerings. This person

will have information about potential changes to the product and how these changes might affect price points.

Informed

Individuals who are identified as needing to be “informed” need to know the final decisions that were made and when a task is completed. It is common to have many people assigned to this category and for some team members to be informed on most tasks. Team members or stakeholders here will not be asked for feedback, so it is key to make sure people who are in this group only require status updates and do not need to provide any direct feedback for the completion of the effort.

Key questions to ask yourself in order to ensure that you have appropriately captured individuals in the “informed” role are:

- Who cares about this task’s completion?
- Who will be affected by the outcome?

Now that you’ve determined who is responsible, accountable, and consulted on the Office Green project task, it is time to determine who needs to be informed about the task. Your Financial Analyst has set the price points with input from the Director of Product, and the Head of Finance has approved. You will now need to inform the Sales Team about the final price points, as they will need this information to sell the product.

	R	A	C	I
Create different price points for different packages and delivery frequencies.	Financial Analyst	Head of Finance	Director of Product	Sales Team

Pro tip: You could end up with a large number of team members and stakeholders who are placed in the “informed” role. If so, make sure that you have a plan to keep them informed that is not labor-intensive. Something as easy as view-only access to your project plan or meeting notes could prevent you from having to create separate communications along the way.

Key takeaway

The RACI chart is a valuable tool. It can help you define and document project roles and responsibilities, give direction to each team member and stakeholder, and ensure work gets done efficiently. A RACI chart can also help you analyze and balance the workload of your team. While it may take many revisions to make sure that your team members and stakeholders are being placed into the right roles in your RACI chart, doing this work up front helps save time and prevent miscommunications later on.

3.3.3 Activity: Set project roles and responsibilities in a RACI chart

Activity Overview

In this activity, you will use a RACI chart to assign roles and responsibilities to project stakeholders. You will analyze a scenario and determine each stakeholder's relationship to project tasks and deliverables.

As a reminder, RACI charts help you determine who is:

- **Responsible**
- **Accountable**
- **Consulted**
- **Informed**

Be sure to complete this activity before moving on. The next course item will provide you with a completed exemplar to compare to your own work. You will not be able to access the exemplar until you have completed this activity.

Scenario

Review the scenario below. Then complete the step-by-step instructions.

As the project manager for Plant Pals, you must assemble a team that can develop and execute the marketing and sales strategy to prepare for the launch. You must also assign roles and responsibilities for each of the project tasks and identify stakeholders impacted by the project. You've determined that the following people will be involved:

- **Director of Product:** Oversees the product offerings, and serves as a resource for marketing and sales questions. Their knowledge of customer needs is vital to the project.
- **Marketing Manager:** Makes key decisions about the service launch and monitors task completion. They oversee all marketing efforts, including concept development, and sign off on the service launch plan.
- **Marketing Coordinator:** Creates the marketing strategy, including all marketing assets. They work closely with the Copywriter and report to the Marketing Manager.
- **Copywriter:** Produces all Plant Pals ad content, writes product descriptions, and creates promotional copy. They work with the Marketing Coordinator on all aspects of the marketing strategy and report to the Marketing Manager.
- **Head of Sales:** Sets Office Green's overall sales strategy and tracks the company's progress towards its sales goals. Their knowledge of customers' buying behaviors can help the marketing team develop their campaign. The Head of Sales oversees the Sales Manager.
- **Sales Manager:** Responsible for customer outreach and relationship management strategies, so that Office Green meets its sales goals. They need to understand the final marketing strategy and product offerings and convey that information to the Sales team. The Sales Manager reports to the Head of Sales.

To develop and execute the marketing strategy and sales, your team must complete the following tasks:

1. Create a marketing plan for the new service
2. Write promotional copy
3. Design marketing assets (e.g., flyers, brochures, and online advertisements)
4. Create a customer outreach and onboarding plan

Step-By-Step Instructions

Step 1: Access the template

To use the template for this course item, click the link below and select “Use Template.”

Link to template: [RACI Chart](#)

Step 2: Add tasks to the RACI chart

Add the four tasks from the scenario to your RACI chart template under the **Task/Deliverable** heading. Replace “Task/Deliverable” with the name of each task.

Step 3: Add team members to the RACI chart

Add your team members to the template. Replace “Role A” with “Director of Product,” and so on.

Step 4: Assign letters in the RACI chart

For each task, assign the letters **R**, **A**, **C**, and **I** to the team members involved. Consult the descriptions below to determine how your team members relate to the tasks:

Responsible: Who is responsible for completing this task? Consider these questions when determining who is responsible:

- Which department manages the work?
- Who should perform the work?

Accountable: Who is accountable if the task isn’t completed? Remember that only one person should be accountable for each task or deliverable. When deciding who is accountable, ask yourself:

- Who might delegate the task to another team member?
- Who makes final decisions about the task?
- Who should review the work to confirm it is complete?

Consulted: Who should be consulted for their insights, expertise, or strong opinions on the task? Here are a few questions to help identify whether someone should be consulted:

- Who can give feedback to responsible individuals to help them complete tasks?
- Who are the subject matter experts (SMEs) for the task?

Informed: Who should be kept informed about task progress or project decisions? Key questions to ask yourself include:

- Who is invested in task completion but not directly involved in the work?
- Who is affected by the project outcome?

Note: *The number of stakeholders you keep informed about each task can vary depending on your situation. In some cases, you might choose to inform all stakeholders who aren't responsible, accountable, or consulted. In others, you could leave some cells in your RACI chart blank for certain tasks. Both approaches are fine for this activity.*

Assessment of Exemplar

Compare the exemplar to your completed RACI chart. Review your work using each of the criteria in the exemplar. What did you do well? Where can you improve? Use your answers to these questions to guide you as you continue to progress through the course.

Note: *Your answers may vary (particularly for Consulted and Informed individuals), depending how you interpreted each stakeholder's responsibilities.*

Office Green						
R - Responsible	Completes the deliverable or task.					
A - Accountable	Makes final decisions and signs off on task completion. Only 1 per task.					
C - Consulted	An advisor, stakeholder, or subject matter expert who offers guidance before an action is taken.					
I - Informed	Kept up to date on decisions made.					
Plant Pals Marketing & Sales Strategy	Director of Product	Marketing Manager	Marketing Coordinator	Copywriter	Head of Sales	Sales Manager
PHASE 1 Task/Deliverable						
1. Create a marketing plan for the new service	C I	A A	R C	C R	C I	I
2. Write promotional copy	I	A A	R R	C C	I	I
3. Design marketing assets	C I	C A	I R	I C	I	I
4. Create a customer outreach and onboarding plan	C C	C I	I I	I A	A R	R
<i>*Note: The Director of Product should be kept informed about the promotional copy and the marketing assets. Other informed individuals may vary.</i>						

In the exemplar for the Plant Pals service, each role has a RACI designation for each task or deliverable. Let's review each of the tasks:

Create a marketing plan for the new service.

- The Marketing Coordinator reports to the Marketing Manager and is **responsible** for creating the marketing plan.
- The Marketing Manager is **accountable** for marketing efforts, including the marketing concept. They have the final say in launching and advertising the Plant Pals service.

- The Copywriter writes and edits the promotional copy, therefore they are **consulted** on the marketing plan.
- The Director of Product and Head of Sales are **consulted** on marketing campaigns since they understand customer needs and buying behaviors.
- The Sales Manager can be kept **informed** of marketing efforts since they need to convey that information to the Sales Team.

Write promotional copy.

- The Copywriter is **responsible** for drafting and editing promotional copy.
- The Marketing Manager is **accountable** for the Copywriter's work.
- The Marketing Coordinator is **consulted** on the promotional and sales copy as they create the marketing plan.
- All other members of the team can be kept **informed** about the status of the promotional copy.

Design marketing assets.

- The Marketing Manager delegates tasks to the Marketing Coordinator, who is **responsible** for producing assets.
- The Marketing Manager is **accountable** for marketing efforts because they make the final decisions.
- The Copywriter is **consulted** about the marketing assets by the Marketing Coordinator.
- All other team members can be kept **informed** about marketing design matters.

Create a customer outreach and onboarding plan

- The Sales Manager is **responsible** for customer outreach and onboarding plan.
- The Head of Sales oversees the Sales Manager, so they are **accountable** for the customer outreach and onboarding plan.
- The Director of Product is **consulted** on questions about customer needs, while the Marketing Manager is **consulted** about the marketing plan.
- All other team members can be kept **informed** about customer outreach.

3.3.4 Getting the most out of a RACI chart

In the previous video, you learned how critical a **RACI chart** is for creating clear roles and giving direction to each team member on a project. In this reading, we will further explore the function and components of RACI charts and how to use them to communicate responsibilities to project teams.

Definition and structure

Determining who is **Responsible**, **Accountable**, **Consulted** and **Informed** on your projects allows you to keep control of the stakeholders roles on your project.

Step	Project initiation	Project executive	Project manager	Project analyst	Project architect	Application developers
1	Task 1	C	A/R	C	I	I
2	Task 2	A	I	R	C	I
3	Task 3	A	I	R	C	I
4	Task 4	C	A	R	R	I

Workload balance

Are there too many tasks assigned to one stakeholder? When you complete your chart, it is a good idea to go back through and tally the number of Rs assigned to each stakeholder. This can help you identify potentially overloading one team member with work. Using a RACI chart to determine responsibility for tasks can help mitigate single points of failure (known as creating **silos**, where the knowledge and responsibility for a task falls on one person) and allow you, as the project manager, to delegate tasks and avoid burnout. Maintaining workload balance is a critical part of project management. It is easy to fall into the pattern of relying on your top performers to keep the project moving forward. But this isn't always healthy for the project or your team. If you find that you don't have the right people to assign responsibilities to, take a step back and evaluate your team.

Put your RACI into practice

Once you have created your RACI chart, it is time to put it into practice. You will first need to share your RACI chart with your sponsors and stakeholders to get buy-in and sign-off. When you get stakeholder buy-in, you will be able to set clear expectations for your team and ensure that everyone is aligned on their responsibilities.

You can document your team and stakeholders' acknowledgment of these expectations through the project charter, meeting notes, and in the RACI chart itself. Think back to a time when you were expected to do something you did not agree with, or weren't clear on. That disagreement or lack of clarity made it difficult to do your best work, right? Getting buy-in and continually checking in with your stakeholders and your team is the way to avoid this potential pitfall!

As you take the time to ensure that each task has an owner identified with the appropriate level of engagement, you are streamlining your communication and decision-making process over the life cycle of your project.

When should you use a RACI chart?

If you are wondering if you should use a RACI chart on your project, it is a good idea to evaluate the complexity of the effort. For example, if you have a very small project team with a small number of stakeholders, clearly defined roles, and a short timeline, introducing a RACI chart could possibly slow down the project. However, larger projects, or even projects that involve a large number of stakeholders, could greatly benefit from a RACI chart. It is always a good idea to work through the creation of a RACI chart and evaluate the outcome. Even if you do not end up using the RACI chart, you will have a better understanding of the project, and your effort will contribute to your project management experience overall.

3.3.5 Why projects fail: Initiation missteps

You have been learning the necessary planning steps to take in order to set a project up for success. But despite your best efforts, projects can still fail. Sometimes the factors that lead to project failure are out of your control. The technology to complete the project is unavailable, for example, or a stakeholder decides to drastically change the goals of the project. However, there are factors that can lead to failure that are more in your control, such as being unable to complete the project deliverables within the agreed upon time or being unable to fulfill the stakeholder's vision for the project.

In this reading, we will explore a few key reasons why projects fail and examine how missteps during the initiation phase can lead to project failure.

Unclear expectations

You may remember the questions you need to answer at the start of the initiation phase of the project, including:

- What is the end goal?
- What are the expected deliverables and schedule?
- What is the budget?
- Who are the stakeholders?

Not taking the time at the beginning of a project to ask essential questions, document decisions, and understand the true scope of the project may lead to failure. After all, without directions, you can never reach your destination.

Unrealistic expectations

We all like to impress our managers, but sometimes, we accidentally agree to unrealistic expectations and set our projects up for failure from the start. For example, if a project is expected to take two weeks due to the level of detail and effort required but we try to complete it in one week, we will not have the resources available to meet the consolidated schedule. This will likely result in quality issues. It's important to understand the requirements of a project before agreeing to any deadlines. As a best practice, don't commit to firm dates when initiating the project to avoid setting unrealistic expectations. You will have more information and will be able to better manage expectations in the planning phase.

Miscommunication

Clear communication is key. If information is not communicated in a timely manner, does not include pertinent information (risks, decisions made, scope changes, etc.), or is not sent to the correct stakeholders, then you may be setting yourself up for failure. Conducting a stakeholder analysis and then utilizing a RACI chart to understand which stakeholders should be kept informed or consulted is a great start to creating an effective communication strategy.

As a project manager, you do not necessarily have to cater to everyone's unique communication styles, but you do have to set expectations about how communication will occur. As you are kicking off a project, make sure you take some time to understand the communication needs of your team and stakeholders. Some people dislike emails and would prefer to have a phone conversation, some prefer to have communication in writing, and some prefer face-to-face meetings. A strong communication system incorporates all of these methods. Set expectations for your communication approach early so that you, your team members, and your stakeholders have a clear understanding of how you will all communicate.

Lack of resources

Resources include your team members, budget, and materials. Unfortunately, without proper planning, your resources can quickly be over-tasked or depleted. Sometimes project managers don't account for the fact that team members are juggling multiple tasks and may not be able to devote the time necessary to complete all of their assigned tasks correctly and on time. Or, project managers may not realize that a specific skill set is required to complete certain tasks. Ensuring that the right team members are available at the right time is crucial.

Another common error is to incorrectly calculate your project expenses. For example, imagine you have a project budget of \$10,000. If your project requires \$10,000 for materials and you also have to ship and install those materials, then you will not have enough money to complete your project. Clarify your resource needs and confirm their availability with leadership up front to avoid delays or issues further along in the project.

Scope creep

The scope provides an overarching framework of what is and is not included in the project's work and deliverables. Defining the scope in the initiation phase helps identify the resources needed, the cost associated with those resources, and the schedule required to complete the work. Sometimes projects fail because the scope of the project grows and impacts to the scope are not captured.

For example, imagine that you are given a project that originally includes three deliverables. During the course of the project, a stakeholder requests that two additional deliverables be included, but no changes are made to the schedule, budget, or team members to reflect the impact of the increased number of deliverables. As a project manager, when deliverables change, you have to make sure that you are capturing the potential impact of those changes to the schedule, budget, and quality. This is why it is so important to make sure that

everything is documented in the initiation phase. Have a plan for how to handle scope creep if it occurs, and clarify who has the authority to approve scope changes.

Key takeaway

Taking the time to clarify expectations—particularly around communication methods, resources available, and scope—during the initiation phase will increase the chances of your project's success. Even if you follow these best practices, you may still encounter failure. Remember that in every failure, there is the opportunity to learn, grow, and do better the next time.

For additional reading on lessons that can be learned from projects that have failed, check out this article: [Seven Lessons to Learn from a Failed Project](#)

Weekly Challenge 3

1. Which of the following responsibilities does project management include?

- Sign off on budget and resources
- Oversee the scope, schedule, budget, and quality of a project
- Apply technical expertise to execute the project's day-to-day tasks
- Ensure that the business meets its overall objectives

 **Correct**

2. Which of the following is a title given to the director responsible for the successful outcome of a project?

- The project manager
- The team member
- The project sponsor
- The client

 **Incorrect**

Please review [the video on identifying project roles](#).

3. As a project manager, you are defining the goals and outcomes for a project. Who should help you with this?

- Project vendors
- Stakeholders
- Minor players
- Team members

 **Correct**

4. What role does the project manager assign to those executing project tasks?

- Project team members
- Project managers
- Secondary stakeholders
- Project sponsors

 **Correct**

5. What is the purpose of a stakeholder analysis?

- Meet with stakeholders to make major project decisions
- Identify stakeholders and determine their involvement in a project
- Talk to stakeholders and learn about their interests
- Determine which stakeholders to exclude from a project

 **Correct**

6. What is the first step in a stakeholder analysis?

- Assess each stakeholder's ability to participate and find ways to involve them
- Determine each stakeholder's level of interest
- Determine each stakeholder's level of influence
- List the stakeholders impacted by the project

 **Correct**

7. What is the main benefit of making a RACI chart?

- Illustrates all of the potential risks and opportunities for success
- Helps set SMART goals
- Assess each stakeholder's ability to participate and build necessary partnerships
- Determines which stakeholders should fill which roles during a project

 **Correct**

8. As a project manager, you assign someone as *responsible* on a RACI chart. What do you expect them to do on the project?

- Ensure the work gets completed
- Carry out the work to complete the tasks
- Give feedback according to their subject matter expertise
- Learn about tasks when they are complete

 **Correct**

9. As a project manager, you make considerations when building a team. You decide how many people should be on the team, if they have the time to work on the project, and if they have a personal incentive to work on the project. What else should you consider when building a team?

- Necessary skills for the project
- Team member communication preferences
- Likelihood of project success
- Degree of stakeholder engagement

 **Correct**

10. As a project manager, you're prioritizing stakeholders with a power grid. You have a stakeholder you will need to manage closely. Where will you place this person in the power grid?

- High interest, low influence
- Low interest, low influence
- High interest, high influence
- Low interest, high influence

 **Correct**

Week 4 : Utilizing Resources and Tools for Project Success

Learning Objectives

- Outline the typical resources needed to manage a project.
- Identify the key components of project charters and develop a project charter for project initiation.
- Evaluate various project management tools to meet project needs.

4.1 Understanding Project Resource Needs

4.1.1 Essential project resources

Project resources usually include **budget, people, and materials**. You'll use **tools to manage all those resources**. As you think about the goals and the scope of the project, you figure out the **different resources** you'll need to meet those goals. It's important to **figure out your resources before the project gets rolling**. This makes it easy for everyone on your team to get their work done, and that's your job as a project manager. You won't be doing the work directly, but you'll support the people who do.

Figuring out resources early on also helps you **avoid accidentally understaffing your project**, which can seriously slow down team progress and eat away at the overall timeline. Even worse, if you're **not careful with your resource planning**, you could wind up **underestimating the budget**. Meaning, you might **not have enough money** to purchase necessary materials, hire vendors, or support overtime requests.

Planning your resources early is a great way to set your team up for success. Because when your teammates have what they need to do their work on time and on budget, they are better set up to meet the project's goals. Now, let's break down some of the resources that project managers typically work with.

Budget

A budget is an **estimate of the amount of money a project will cost to complete**. Almost all projects have budgets because they need funding for expenses, like buying the right materials or software, hiring vendors to complete jobs, or doing marketing once the project's done. During the initiation phase, you'll talk to the stakeholders and the people working on the project to figure out the tasks needed to get the project done. Here, you might **ask questions** to help uncover hidden costs. For example:

- Are there any taxes on products that you need to account for?
- What about extra fees?

All this information will help you create a budget, which you can use to source and compare proposals from vendors, figure out upcoming costs, and track all the money moving in and

out of your project. You'll often include the budget in the project charter, and the stakeholders review it for approval.

People

When we talk about resources, we're also talking about the team of people who help execute the tasks of a project. For example, you, as the project manager are a resource. So is the marketing manager who might create advertisements for this new product. Other resources can include **people outside of your company** who have unique skills and can do certain tasks that people in your organization can't do personally.

Materials

Then, you have materials. These are **items you need to help get the project done**. For example, project materials might include the lumber needed to complete a construction project.

How do you **organize these resources**? That's actually a nice transition into our next topic which is: **tools**. Tools are **aids that make it easier** for a project manager or team **to manage resources and organize work**. They help you do things like **track tasks, manage budgets, and collaborate with teammates**. There are all kinds of tools out there including productivity tools like Google Docs and work management software like Asana.

Let's talk about how you might determine your resources during the initiation phase of your project at Office Green. As a reminder, the Plant Pal Service offers customers small low maintenance plants like cacti and leafy ferns that they can place on their desks. Customers can order them online or from a print catalogue, and Office Green will ship the plant straight to the customer's work address. The project goal is to increase revenue by 5%.

So how do you get started? Well, you might do some research to figure out the cost of launching the new plant service. That might include the estimated prices of developing a new website, a new promotional materials, as well as shipping and delivery costs. You also might want to budget for specific tools, like a project management software that will help you track progress on this complex project.

With that information, you can start to build a realistic budget and you'll also need to figure out who's working on this project with you. To do this, you might make a list of people and external vendors who will help complete all the projects' tasks. For example, the person who manages client communications with customers or a new plant supplier that can provide you with your product.

4.1.2 Managing resources to get the job done

As we continue learning the tools and techniques that will help you succeed in project management, let's consider the importance of **project resources**. Project resources are who and what you depend on to complete a project, including budget, materials, and people. While each resource is a separate entity, they all depend on one another—your team cannot do the work without materials, and you cannot purchase materials without a budget. In this reading, we will discuss some key project resources and tips for managing them.

Budget

Have you ever created a budget for yourself or your family? If you have, you know that a budget includes a wide variety of expenses. For example, a monthly personal budget can contain items that include anything from food to transportation costs to rent. With only a certain amount of funding to cover each expense, it is important to closely monitor your spending to avoid going over budget. If you go over in one category of your budget, you will impact the others and will need to make adjustments. As a project manager, you will take the same general approach with your project budget.

Common aspects of your project budget will include:

- Team: the cost of the people performing the work
- Services: any outside vendors helping your project
- Materials: any tangible items purchased to complete the project

Throughout your project management career, you will encounter various types of projects with a wide range of budgets. Some budgets will have no margin for error, whereas other budgets may be more flexible. Regardless of this variability, budget issues will inevitably arise, so it is important to make sure that the budget is aligned with the project scope and the stakeholders' asks.

People

People are a vital resource on your project; you cannot complete your project on your own! You will need to rely on a strong team of people with a variety of skill sets and specialties to get the job done. As a project manager, make sure that you have commitment and buy-in on the number of hours it will take for your resources to complete their tasks. Additionally, you will find the best partners on a project are people who are aligned to the goals of the project or who are most interested in the project's work.

Materials

Materials can be different on every project. For example, if you were working on an IT project, materials could include hard drives and computers to handle the coding efforts. You can also have materials that are intangible. For example, on the same IT project, online storage, software programs, or employee training may also be considered materials. It is important to account for any and all potential materials in order to execute a successful project with the right people and within budget.

Key takeaway

Your project resources include things like the budget, people, and materials. As a project manager, remembering that your resources are dependent on one another is key to understanding the function of each resource and determining how to manage all of them. Take the time to interview stakeholders and potential team members about what resources they think they will need in order to deliver the project. They may have an idea of materials they require that you may not have accounted for within the budget, for example, or can identify people with expertise that would make them an asset to the project team.

4.2 Developing Documentation for Project Kick-Off

4.2.1 The value of project documentation

Clear and consistent documentation can ensure transparency and clear communication. Documentation helps **set the stage for the project**. It communicates the answers to key questions. For example:

- What problem are you trying to solve?
- What are the project goals?
- What are the scope and deliverables, and who are the project's stakeholders?
- What resources does the team need to complete their work?

This is all crucial information for anyone who's working on a project, regardless of their role.

Documentation also helps **preserve decisions made early on** in the project and can serve as a **reference point for team members who might join later** in the project life cycle. It's your job to ensure that this information is **easily accessible** through some kind of formal documentation, like an e-mail, a presentation, or a digital document.

Also, **documenting decisions** can help you **uncover tasks, timelines, or costs** you hadn't previously considered. And lastly, this process **provides a historical record** that can be **reviewed at the end** of your project.

4.2.2 Project proposals and charters 101

Now let's talk about **two common types of documentation** you could use to keep track of details and keep your stakeholders informed. These are: **the project proposal** and **the project charter**.

- A **project proposal** is a **form of documentation that comes at the very beginning of the project**. This document's purpose is **to persuade stakeholders** that a project should begin. And typically, **a senior organizational leader creates the proposal**. So you might not need to worry about creating the proposal, but you will have to **keep track of the proposal's progress**. The project proposal is a great starting point to help you understand the desired goals and impact. A proposal may be a **formal document, a presentation, or even a simple email** to get others on board with the idea.
- A **project charter** is a **formal document** that clearly **defines the project** and **outlines the necessary details to reach its goals**. A project charter **helps you get organized, set up a framework for what needs to be done, and communicate those details to others**.

So how do these documents differ?

- A **project proposal** is created earlier in the project life cycle than the **project charter**. The proposal kicks off the initiation phase by **influencing and persuading the company** to move forward with the project. The **project charter** serves a similar purpose and often **comes at the end of the initiation phase**. However, its goal is to more clearly define the key details of the project.

- A charter will often serve as a point of reference throughout the life of a project. The proposal is only used at the earlier stages.

The project charter makes clear that the **benefits of the project outweigh the costs**. As you learned earlier in this course, there are a few questions you might ask yourself when performing a **cost benefit analysis**. That includes questions like:

- What value will this project create?
- How much money could this project save my organization?
- How much time will people have to spend on this project?

You'll **include the answers to these questions in your charter**. Including this type of information ensures that you and your stakeholders agree on the project value. The charter also **helps ensure that you and your stakeholders agree on the details of the project**. **Project charter approval means that management is supportive**, and it's also a key step to ensure that **the project matches the needs of the organization**. After the stakeholders and project sponsor have reviewed and approved the project charter, you now have **the authority to move forward with the project**.

Project charters can be formatted in a few ways and can contain different information depending on the project and the organization. The information in a charter might also be tailored to its audience or the needs of specific stakeholders. For example:

- If you're writing a project charter for a stakeholder who is a marketing executive, the charter might include information about how the project will impact the organization's brand.
- If the stakeholder is a chief technology officer, the charter might include information on the cost of engineering resources needed to maintain the project.

Regardless of the format or the audience, creating a project charter is a best practice for ensuring that everyone agrees on how to move forward before entering the planning phase. **The project charter is a living document**. This means that it **can evolve as the project progresses**.

4.2.3 Project charters: Elements and formats

A **project charter** clearly defines the project and outlines the necessary details for the project to reach its goals. A well-documented project charter can be a project manager's secret weapon to success. In this reading, we will go over the function, key elements, and significance of a project charter and learn how to create one.

The charter is the formal way that the project's goals, values, benefits, and details are captured. You can think of the charter as the compass for your project since you will use it throughout the life cycle of the project. Many stakeholders will look to your project charter to ensure that you are indeed aligned with strategic goals and set up for achieving the desired end goal. Since the project charter carries so much importance, it is important to incorporate the right amount of detail while omitting miscellaneous elements.

As with any of your project documents, it is a good idea to collaborate with your team and stakeholders early and often. Developing the project charter in collaboration with both

groups can help you make sure that your project charter addresses your key stakeholders' most important concerns and keeps your team aligned. Be sure to use the business case—the reason for initiating the project—as the guiding direction to your project charter. Project charters can vary from organization to organization and from project to project. It is key for a project manager to identify the best type of charter for the project in order to capture the relevant information and set your project up for success. Project charters will vary but usually include some combination of the following key information:

- introduction/project summary
- goals/objectives
- business case/benefits and costs
- project team
- scope
- success criteria
- major requirements or key deliverables
- budget
- schedule/timeline or milestones
- constraints and assumptions
- risks
- OKRs
- approvals

You will likely use many different project charter formats throughout your project management career. One example is a condensed, simplified document, like the one you'll learn about in the upcoming video and the one linked in the activities. A short and simple project charter can be used on smaller projects that are not very complex.

Team	Goals/Problem statement	Key success metrics	Target	Achieved
Project sponsor (Name)	The issue(s) we're trying to resolve!	Ex: Cost savings	\$X	\$X
PM (Name)		Ex: Quality improvement	X%	X%
Core project team (Name) (Name) (Name) (Name) (Name)	Business case What are the benefits of this project?	Ex: Time savings	X%	X%
		Ex: Capability improvement	X%	X%
		Accessibility considerations		
Timeline	Risks	Key deliverables	OKRs	
Project definition	Risk 1	KD 1	OKR 1	
Confirm target metrics	Risk 2	KD 2	OKR 2	
Design solution	Risk 3	KD 3	OKR 3	
Implementation	Risk 4	KD 4	OKR 4	
Sustain				

For more complex projects, you may link to additional analysis or documents. You can house these items in the appendix.

Your organization may have a unique template for you to use, or you may have the flexibility to leverage one you come across in your career. As your project progresses, you may also encounter revisions to your project charter—and that is okay. Remember, it is a living document; let it grow with your project, and **review and revisit it often** to ensure you are aligned.

4.2.4 Developing a project charter

Project charters are key for securing approval from stakeholders and moving forward. Project charters can also be formatted in many different ways and there are many different templates available online for you to choose from. Here, we'll use a template that's similar to one that program managers often use at Google and to fill in each section will use details from your project at Office Green.

Link to template: [Project charter](#)



Document Status: Draft | In Review | Approved

Executive Summary:

Our plan is to offer high volume customers small, low maintenance plants that can thrive in an office environment./

Project Goals

SMART:

- Increase revenue by 5% by rolling out a new service that provides office plants to top clients by the end of the year.|

Deliverables

- Send 1,000 plants to 100 customers
- Launch a new website for orders and customer support|

Business Case / Background

Why are we doing this?

This is a top requested service from customers, and will improve customer satisfaction and retention.

Benefits & Costs

Benefits

- Improved customer satisfaction
- Increased revenue

Costs:

- Sourcing products
- Developing a website
- Marketing materials

Budget needed:

- \$250,000

Scope and Exclusion

In Scope:

We'll create a service to deliver small plants to last year's top clients.

Out of Scope:

Plant care

Project Team

Project Sponsor

Director of Product

Project Lead

JuAnne

Project Team

- Marketing associates
- Website developers
- Plant vendors

Additional Stakeholders

- VP, Customer Success
- Account Manager
- Fulfillment Manager

Measuring Success:

What is acceptable:

- 5% revenue increase by EOY
- 95% customer satisfaction three months after launch

Additional stakeholders may include the vice president of customer success, who is accountable for customer feedback and corresponding product requests. We can also add in the account manager who will leverage their existing relationships with top clients. And let's also add in the fulfillment manager, who will help acquire the plants needed to launch the service.

4.2.5 Identify: Components of a project charter

1. Executive summary

Project overview

Our plan is to add a line of replacement laces that will stay tied during athletic activity.

2. Project goals

SMART objective 1

Increase overall revenue by 3% by the end of fourth quarter by releasing our new athletic shoelaces.

SMART objective 2

Gain 2,000 new social media followers from the running community prior to launch.

3. Deliverables

Major requirements

- Design slip-proof shoelace weave.
- Manufacture 12,000 pairs of athletic shoelaces.
- Increase brand awareness in the running community.

4. Business case

Why are we doing this?

Customer research reveals this as an untapped opportunity in the market, with the potential to win loyalty among a demographic obsessed with finding the best gear.

5. Benefits and costs

What we'll gain/pay

Benefits:

- Add new product to our lace line, leading to 3% revenue increase, increased brand awareness and customer loyalty

Costs:

- Price of materials, design, and prototyping
- Adding laces to inventory software

Budget needed:

- \$525,000

6. Scope and exclusion**What's in- and out-of-scope****In-scope:**

- Product development, prototyping, manufacturing, marketing

Out-of-scope:

- Vendor contracts, delivery to customers

7. Project team**Stakeholders**

- Project sponsor: Director of merchandise
- Project lead: Project manager (you)
- Project team: Shoelace designer, prototyper, quality assurance tester
- Additional stakeholders: Director of market research, marketing manager, sales manager, director of online sales

8. Measuring success**What is acceptable**

- 3% increase in revenue by the end of the fourth quarter
- 5% increase in new customers three months after product launch

4.3 Evaluating Tools to Meet Project Needs

4.3.1 Utilizing tools for effective project management

Tools are aids that make it easier for a project manager or team to manage resources and organize work. They're useful because they can help you track detailed information about all kinds of tasks, and they make it easy to communicate with lots of different people. And remember, effective communication and tracking are huge parts of a project manager's day-to-day responsibilities.

Today's tools have made it so much easier to share information with teammates. Even better with project management tools, information sharing goes both ways. That means team members can also easily update you on their progress without the need for extra meetings or phone calls.

When you **choose the right tool** for a project:

- You make it easy for teammates to let you know if a **task is on schedule or if it's delayed**, which lets you quickly see how any changes might affect the rest of the project.
- **Increase visibility and transparency for everyone**, including stakeholders. You can use a variety of tools to accomplish many different things, like tracking progress on tasks, deliverables, and milestones.
- **Manage a budget**
- **Build helpful charts and diagrams**
- **Manage contracts and licenses**
- **Keep stakeholders informed**.

Tools can be **straightforward**, like digital spreadsheets or documents, or they can be **more sophisticated**, like scheduling and work management software. It's important to think about the needs of the project when choosing which to use.

One thing to keep in mind is that if you choose a more sophisticated tool, your teammates and stakeholders will need some time to get familiar with it. For small projects, that might be more trouble than it's worth. So for small projects, a straightforward tool might be more effective. But if a project has a big scope, then it might be worth the team's time to learn and ultimately work with a more sophisticated project management tool.

4.3.2 Introducing new tools to a team

Project management tools and processes are always evolving. In this reading, we will discuss the importance of choosing the right tools for a project and the implications of introducing new tools to your team.

As a project manager, it is important to be open to implementing new tools that may be beneficial to a project's outcome. You will experience change in lots of forms throughout your project's life cycle, and navigating change is essential. But if you choose to implement a tool that your team is unfamiliar with—especially if you decide to roll it out midway through a project—your team may be hesitant. People embrace change differently, particularly if the change will directly impact their routine and the way they work. Simply put: Change can be met with resistance.

Before you introduce a new tool to your team, you should be sure that this change is actually going to benefit the project, and ensure that those involved in your project understand the benefits of this change. Demonstrating to your teammates and stakeholders that you understand the tool and have evaluated its competency will help build trust, especially if this new tool is replacing an existing tool. Taking the time to introduce the new tool to your team members will also demonstrate that you have the best interest of the team in mind—not just the success of the project.

Here are some important considerations and keys to successfully introducing new tools:

- **Discuss the tool early and often, if possible.** The team should not feel blindsided by a new change. Make sure they know the change is coming as early as possible. This will help them prepare for an introduction or migration to the new tool.

- **Ask for feedback from key stakeholders.** You could get great feedback on features that you may have overlooked without asking for their expertise. You can solicit this feedback by requesting their input about functionality or have them list features in order of priority. The key is to create an opportunity for stakeholders to provide their feedback and allow you to incorporate their feedback into next steps.
- **Involve the key stakeholders in demonstrations as you get closer to making the final decision on the project tracking tool.** You will be able to leverage key stakeholders' acceptance by letting them test the product or sign up for a trial run. It is also important to make sure that the tool is actually going to meet the mark and provide a meaningful change for the project. You may want to pull in key users from your team to test and familiarize themselves with the tool prior to rolling it out. This will allow the team to get on board with your plans or discuss their concerns beforehand. This will also highlight in-house experts for future training, assistance, and implementation.
- **Ensure the tool is fully functional before the team is introduced to it.** Whenever possible, hold off from introducing the tool if it still has any issues. Make sure the tool is accessible for all users. Keep in mind, your team members may resist a tool that doesn't live up to how it is supposed to function. This will impact implementation and acceptance fairly significantly, so put your best tool forward!
- **Set up training for the tool as needed before you ask the team to actually use it.** Everyone has different levels of comfort with different tools. It is your job as the project manager to ensure that each team members' needs are addressed. Setting up training also helps create positive first impressions, which will lead to higher productivity and quicker, more successful implementation and acceptance.

Remember, some pushback is normal, but successful project managers should take the steps to prepare and mitigate any friction for their team when possible.

Pro tip: If time allows, plan for a period of transition if you are replacing an existing tool. It is common to allow both tools to operate during this period. You will need to “sunset,” or retire, the existing tool eventually, but allowing for a period of transition between using the old tool and the new tool can help stakeholders and team members feel more at ease and give them time to gain familiarity with the new tool. Be prepared for productivity to be impacted as the team transitions from one tool to another.

4.3.3 Exploring types of project management tools

Scheduling and work management software

There are lots of different types of work management software on the market, including popular tools like **Asana & Jira**. Certain tools may work better for your project **depending on a bunch of things**; for example, **the project methodology** you're running or **the number of tasks and people involved**.

So, why would you choose to use scheduling and work management software? Well, it can be **really useful for assigning tasks to multiple teammates** and for **tracking progress** on that work. It can also help you **visualize your team's progress**. For example, if you're using work management software to assign and track tasks, you're more likely to notice if your team completes 50 tasks one week and just three tasks the following week. That's a clear

sign that you need to check in to see if there's a problem that's blocking progress. If you hadn't been tracking their tasks, you might not have noticed the issue. That's part of the reason why work management software is so useful. It **provides an overview of how the project is going** so you know when you need to check in with your teams to get tasks back on track.

Productivity tools

Productivity tools can be very helpful for you and your team. This includes:

- **Word processing tools**, like Microsoft Word or Google Docs. You can use these to create shared documents with the team, like the project charter. You can also use these tools to build documents like meeting agendas and status updates.
- **Spreadsheets**. They're versatile, and you can use them to make documents, like RACI charts and project plans, as well as other helpful charts.
- **Presentations** tools, like Microsoft PowerPoint, Keynote, or Google Slides can be a great way to package your project in a visual, easily-digestible way.

Collaboration tools

Collaboration tools include tools you're probably familiar with, like **email and chat**. Tools like this can help you quickly and efficiently check in with each other on questions, comments, and other topics related to the project.

Productivity tools like documents and spreadsheets, and **collaboration tools** like email and chat, are all pretty simple, which means they're **great for smaller projects** with fewer tasks and teammates to keep track of. **Scheduling and work management software** is better for **bigger projects with a larger number of tasks and a bigger team of people to manage**.

Test your knowledge: Evaluating tools

1. What are the main uses of scheduling and work management software? Select all that apply.

- Quickly communicate with teammates and stakeholders
- Efficiently track progress on the team's work

 **Correct**

Work management software is useful to track and visualize progress so project managers don't have to do it manually. It also helps them easily assign tasks.

- Easily assign tasks to multiple teammates

 **Correct**

With the software, the project manager can easily assign tasks and the team can understand who is working on what tasks. It also helps the project manager visualize team progress.

- Help visualize a team's project progress

 **Correct**

The software typically has a visual component that makes it easy to understand task progress. It also helps project managers easily assign tasks.

2. Which of the following are best practices when introducing a new tool to a team? Select all that apply.

- If replacing a tool, allow for a transition period

 **Correct**

If you are replacing an existing tool, allow for a period of time to transition from the old tool to the new. You should also ask for stakeholder input and make time to discuss the tool from the start.

- Get feedback from stakeholders on important features that may help manage the project.

 **Correct**

Use stakeholder expertise to get feedback on features. You may also ask for their input on the tool's functionality.

- Ensure the tool is functional *after* the team is introduced to it.

- Discuss the tool early and often

 **Correct**

Make sure you give your team enough time to prepare to use a new tool. Discuss the new tool with them from the start so they don't feel surprised when you introduce it. You should also give them the chance to provide feedback.

3. Fill in the blank: If a project has a _____, then it may be worth the team's time to learn a more sophisticated tool.

- large scope
- small team
- limited budget
- short deadline

 **Correct**

Projects with a large scope and sufficient funding may benefit from a more robust project management tool. With a more sophisticated tool, the project team and stakeholders will need time to get familiar with it.

4. As a project manager, you need to determine how best to communicate with stakeholders across the company. Which tools are best for communicating?

- Productivity tools
- Collaboration tools
- Work management software
- Budgeting tools

 **Correct**

Collaboration tools such as email and chat can help you quickly and efficiently communicate with your team and stakeholders.

5. Which three of the following best practices can help you choose tools for your project?

- Understand a tool's purpose.

 **Correct**

When you understand a tool's purpose, you can determine if it's going to solve a specific problem. For example, some tools are good at helping you organize work and manage resources. Other tools will help you communicate more effectively.

- Choose the same tools you used in your last project.
- Know a tool's capability.

 **Correct**

When you understand a tool's capability, you determine if it's going to make tasks easier for you or cause additional confusion. Sophisticated tools like scheduling and work management software can solve very specific problems. For example, they can help you visualize your team's progress.

- Select tools based on your project's scope

 **Correct**

You may choose a tool based upon the project's scope. For a larger project, you may need to use a more sophisticated tool. For a smaller project, a straight-forward tool might be more effective.

4.3.4 Common project management tools

Asana

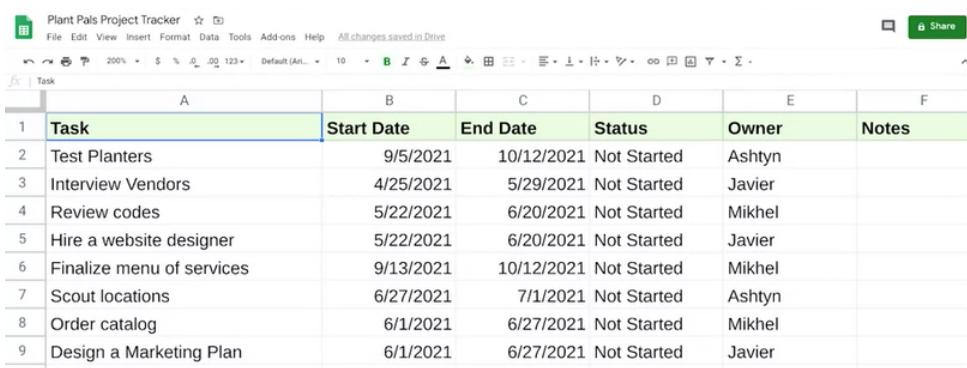
Asana is a work management platform that helps teams **plan and coordinate their work** from **daily tasks to strategic initiatives**. Asana **provides a living system** and a source of truth where everyone's work lives. With Asana, everyone can **see, discuss, and manage team priorities**, giving teams clarity on who is doing what by when. It's great for:

- building project plans
- assigning tasks
- automating workflows
- tracking progress
- communicating with stakeholders

As a project manager, you can use Asana to **create a log of tasks**, like gathering cost estimates from external vendors, and **assign a task to people on the team**. All **tasks are visible and organized** in the format of the project manager's choice—like in **a list** or on a **calendar**—and designed to drive transparency and connection with all the tasks related to the overall goal. It's easy to use with external stakeholders as well, because within Asana, you can **share status updates** and other communications with people outside your company.

Spreadsheets

Spreadsheets are extremely **versatile**, and you can use them for a wide range of tasks, from **creating timelines** and **billing charts** to **managing budgets** and **tracking tasks**. You can add and view project information in a variety of formats, depending on what you need in the moment. For example, let's say you enter a list of tasks, due dates, completion statuses, and task owners into a spreadsheet.



Task	Start Date	End Date	Status	Owner	Notes
Test Planters	9/5/2021	10/12/2021	Not Started	Ashtyn	
Interview Vendors	4/25/2021	5/29/2021	Not Started	Javier	
Review codes	5/22/2021	6/20/2021	Not Started	Mikhel	
Hire a website designer	5/22/2021	6/20/2021	Not Started	Javier	
Finalize menu of services	9/13/2021	10/12/2021	Not Started	Mikhel	
Scout locations	6/27/2021	7/1/2021	Not Started	Ashtyn	
Order catalog	6/1/2021	6/27/2021	Not Started	Mikhel	
Design a Marketing Plan	6/1/2021	6/27/2021	Not Started	Javier	

From there, it's very simple to sort the list by due date to see what's due next. You can then filter the list of tasks by task owner, so that you only see the things you're responsible for. You can also highlight the rows of the sheet in different colors to visually illustrate the tasks with the least progress. With spreadsheets, you can easily transform, visualize, and manipulate information.

If your company doesn't have a standard software tool, you can **choose the right one for the project needs**. Being able to recommend the right tool for the job can be a great way to

add value to your team at the beginning of a project. Keep in mind, however, that software options are constantly changing. From the addition of new features to the launch of new tools, there's no way for you to know every software available, and no company would expect that of you. Many of these **tools have similar functionality**, like **task tracking** and **task assignment**, so if you understand one tool deeply, you should be able to easily adapt to a new tool on the job.

4.3.5 Using Google Sheets for project management

Essential Sheets features for project management

1. Collaborate with your team

Google Sheets makes it easy to collaborate and share information. This is useful for remote workgroups or working with teams that have different schedules.

When you share your Sheet, you can select from the following permissions:

- **editing**, which allows others to make direct edits and changes to the file;
- **commenting**, which allows others to add comments and make suggestions; or
- **view only**, which allows others to view the file but not edit, comment, or suggest.
This is a good choice if you don't want any changes to be made to the file.

Once you've shared your Sheet with your team and given them either editing or commenting permissions, you can all collaborate directly in the Sheet by leaving comments. You can also assign a task or action item through comments.

Check out these resources from the Google Help Center to learn more: [Share and collaborate on files](#)

2. Format your spreadsheet

Create lists

To create any list in Sheets, simply label each list—for example, Name, Date, Notes, or other criteria—in the **header row**. (The header row is the top row in the spreadsheet.) Then, add a different list item in each cell underneath the list title. Most lists are arranged vertically, but you might prefer a horizontal list depending on the types of items. *Note: You'll learn how to build out a full project plan and prioritize tasks later in this course.*

Display and hide content

Freeze rows or columns

Freezing the header row (or column for horizontal lists) and formatting headers is a great way to make the list titles stand out. Freezing a header row keeps the row in place when you scroll down the list, so you can always see what the list titles are. Format the headers just like you would text in a document by changing the font, style, size, or color.

Group and hide related content

Grouping rows and columns allows you to expand and collapse larger categories of data or information with a single click. This makes your spreadsheet easier to read and manage by hiding the grouped data when it's not needed, or quickly ungroup and show when it is needed.

Check out these resources from the Google Help Center to learn more:

- [Freeze or merge rows and columns; Group, ungroup, or hide rows or columns](#)
- [Google Sheets cheat sheet](#)

Add checkboxes

Checkboxes provide a quick and highly-visual way to track progress on a task or indicate whether certain criteria have been met.

Check out these resources from the Google Help Center to learn more: [Add checkboxes to spreadsheets](#)

3. Organize data

Create dropdown lists

If you're working with others on a shared Sheet, you might end up with inconsistent responses or descriptions of data. For example, one teammate may list their task as "done" while another notes it as "complete." Adding a dropdown list (also referred to as **data validation**) ensures the data entered into your spreadsheet is exactly what you specify. It also makes it much faster for others to add data since they're selecting from a predetermined list of options.

Check out these resources from the Google Help Center to learn more: [Restrict data entry with lists](#)

Add color coding

Sometimes it's helpful to change the color of cells and text so you can quickly see how your project is progressing. You can add color coding to your spreadsheet by applying **conditional formatting**. Conditional formatting formats cells in a certain way if they contain specific information. For example, track progress status as "Not started" in red, "In progress" in orange, and "Complete" in green.

Check out these resources from the Google Help Center to learn more: [See data changes with conditional formatting](#)

Sort and filter data

Large sets of data can be difficult to manage. Sheets helps you sort and filter data to limit what is visible and find specific types of data within your spreadsheet.

Sorting data allows you to arrange data in exactly the order you want it to appear in, like alphabetical, by date, or progress level. **Filtering** limits what data gets displayed and shows you only the data you are interested in, such as tasks that have not yet been started, or budget items within a certain value range.

Check out these resources from the Google Help Center to learn more: [Filter data in a spreadsheet](#)

Add links

It can be helpful to link to other project documentation or even external websites in your spreadsheet. This provides your team easy, centralized access to all relevant data they might need. For example, you could add a link to your project charter document from your project plan spreadsheet.

Check out these resources from the Google Help Center to learn more:

- [Use links](#)
- [Link to data in a spreadsheet](#)

4. Visualize data

Create a pivot table

A **pivot table** is a basic data analysis tool. Pivot tables summarize your data and can help show the relationships between data points, making it easier to understand all the information contained in your spreadsheet. You'll learn more about how to create and use a pivot table later in this course. Or, check out the Help Center article below.

Check out these resources from the Google Help Center to learn more: [Create and edit pivot tables](#)

Make a chart or graph

Presenting data in charts and graphs is a great way to quickly and effectively summarize important information about your project to stakeholders and make reports and presentations more engaging. Sheets enables you to automatically create different kinds of charts and graphs using the data in your spreadsheet.

Check out these resources from the Google Help Center to learn more: [Insert and edit charts](#)

5. Perform calculations

Use functions

Functions can be used to manipulate data and perform calculations. Google Sheets has a wide array of functions that are already built in, which means they will automatically perform the calculations you specify. Use functions to quickly calculate sums or averages, automatically determine start or end dates, generate financial reports, and much more.

Check out these resources from the Google Help Center to learn more:

- [Add formulas and functions](#)
- [Google Sheets cheat sheet](#)

Useful spreadsheet templates

Creating the same types of spreadsheets over and over can be time-consuming. You can save time by using templates such as those available from the [Google Sheets template gallery](#). Choose from a variety of pre-made spreadsheets for budgets, schedules, and trackers, or create your own!

Some of the more common templates are described and linked below. To use the templates for these course items, click the links below and select “Use Template”:

Project Timeline

A project timeline template is useful if you want to track an entire project from conception to close. This example includes a visual timeline that lays out the life cycle of a project and the major activities that need to happen during each phase. You’ll learn more about creating and tracking a project timeline later in the course and get to experience working with your own project timeline templates.

Project Tracking

A project tracking template is useful for tracking your project’s budget, deliverables, and other data. This example includes columns for tracking costs and time, as well as a column with dropdown lists for tracking tasks’ priority levels. Other features include formulas for calculating hours, costs, and percentage of deliverables completed, which allow you to track your spending and progress on a project.

Gantt Chart

A Gantt chart combines many of the aspects of other types of project management spreadsheets into one. It organizes tasks by day and is useful for showing the relationships between the many moving parts of a project. It’s also helpful for managing a project with multiple collaborators. Gantt charts often include conditional formatting that makes cells change color based on how far along the project is so you can immediately determine how much progress you have made on a particular task.

Event Marketing Timeline

A timeline template is useful for creating a schedule, tracking events, and visualizing the tasks and milestones involved in a project. You might use this template to manage a project that involves a lot of marketing or public-facing tasks. You can track social media posts, market research, and coordinate content across multiple platforms.

Check out these resources from the Google Help Center to learn more: [Create document templates](#)

4.3.6 Demonstrating your knowledge of project management tools

During an interview for a project manager position, the interviewer may ask you to discuss the project management tools you are familiar with or have used in the past. There are many types of project management tools that you will come across during your career. These tools will continue to grow and change as technology improves. Being able to talk about these tools, and how you use them, will be crucial to landing the role.

In addition to the interviewer asking general questions about tools, they may ask more specific questions, like “How do you know if a project is off track?” It’s important to tie this answer back to the types of scheduling tools you have learned about in this course. If you haven’t had experience working with certain scheduling tools, like Smartsheet or digital spreadsheets—try to leverage real-life experience.

For example, have you ever planned for a move? If so, you can discuss how you planned your timeline and scheduled vendors so that you could meet your move date. Did you use a spreadsheet to keep track of your budget, schedule, and belongings? This experience demonstrates you understand how to use tools. It also demonstrates that you know the importance of creating, monitoring, and managing the project schedule to deliver results at project completion.

Another related question the interviewer may ask could be, “How do you execute tasks within your timeline?” This is a great opportunity to demonstrate your ability to be productive by sharing your experience with tools, such as digital documents or spreadsheets. These tools help you create project artifacts, track tasks, and store project details in one place! You can also use them as a collaboration tool because they are easily shareable with teammates and stakeholders and allow for real-time updates.

Finally, there are special project management tools, also called work management tools, that put all the benefits discussed above into one place. Project management tools such as Asana, Monday.com, Basecamp, and Trello are among some of the top ranked tools for managing projects. These tools help you plan, track, and complete work across many project phases. They often have visually appealing layouts and automated features that save time and create efficiency in a project manager’s day-to-day tasks. Explaining your knowledge of these tools—and how they benefit the project manager, team, and company—in an interview is a great way to demonstrate that you are qualified for the role.

Pro tip: Learn more by trying free tutorials or trial versions of popular project management tools. By navigating project management software, you will be able to explain the uses and functionality of these types of tools firsthand. Here are some examples to get started:

- [Asana](#) and [Asana Guide](#)
- [Basecamp](#)
- [Trello](#)
- [Jira](#)
- [ClickUp](#)
- [Monday.com](#)
- [Microsoft Project](#) or [Project Libre](#) (open source)
- [Smartsheet \(Demo\)](#)

4.3.7 Build a project management tool tracker

As you progress through this course, you will learn about different types of tools used by project managers and the organizations that hire them. Tools can include software applications like Adobe, Google, and Microsoft and specific work management tools like Jira and Asana. They can also include methodologies, techniques, formulas and concepts, and technologies related to project management.

This reading provides step-by-step instructions for creating a tracker for all of these types of tools. You can use your tracker to list the different tools you learn about, their descriptions and links, their features and benefits, and your level of experience with each. This way, you can easily identify the tools required for different roles and can determine where you might want to focus your professional development efforts.

Developing your tool tracker spreadsheet

Follow these steps to begin creating your project management tool tracker:

Step 1: Create a new spreadsheet

Start by opening a new spreadsheet using your preferred method. If you have a Google account, click the link to open a [Project Management Tool Tracker Template](#).

Some of the information has already been filled in for you as an example. Feel free to modify your Tracker in the way that works best for you.

Step 2: Add column headers

Consider the different types of information you'd like to track about each tool, and add these as **column headers** in your tracker. (The header is the top cell or cells in a column in the spreadsheet.)

Here are some example column headers:

- Tool Name
- Description/Benefits
- Link to product website
- Link to course content in Coursera
- Cost to use
- Requirements (training/equipment)
- Your current experience with the tool
- Notes

	A	B	C	D	E	F	G	H
1	Tool Name	Description/Benefits	Link to website	Link to course content	Cost	Requirements (training/equipment)	My experience	Notes
2	Project Charter			Project charters: Purpose				
3	RACI Chart							
4	Google Docs	Word processing tool for writing reports and other documents, collaborate						
5	Google Sheets	Spreadsheets for tracking progress, productivity; use formulas, charts, sort data	https://support.google		Free with Google account			
6	Keynote							
7	Asana	Work management tool. Assign tasks, track progress, share updates and communicate. Automated templates and features to streamline data input and workflow.						Has different templates and tools for Agile, like Kanban boards and tracking user stories.
8	Agile	Project management approach in which project phases overlap and tasks are completed in iterations						

Step 3: Add tools and relevant information

Review some of the course videos, readings, and activities so far that discuss project management tools. Select three or four tools and add the names to the tracker. Add any information you have about each tool to the different columns. To help you get started, the template has several tools listed that have already been mentioned in this course. Feel free to edit the list to include the tools that are most relevant to your progress.

You might not be able to fill in all the columns with information just from this course, so do your own research if necessary.

For example, we discuss the work management tool Asana in the video [Common project management tools](#), but we only cover some of the features and benefits. You can look up the Asana website online and add more information about what features are offered, along with pricing and system requirements.

Step 4: Format your sheet

After you've added a few tools and some initial information, format your sheet by bolding column headers and adding drop-down lists, conditional formatting, or web links. Try out other formatting options like bolding, highlighting, or colors to make important text stand out. [Google Sheets training and help](#) contains articles with step-by-step directions for how to use all of these features and more.

Tool Name	Tool Type	Description/Benefits	Link to website	Link to course content	Cost	Requirements (training/equipment)	My experience	Notes
Project Charter	Documentation			Project charters: Purpose			Some	
RACI Chart	Documentation						Some	
Google Docs	Word processing	Word processing tool for writing reports and other documents, collaborate				Advanced		
Google Sheets	Spreadsheets	Spreadsheets for tracking progress, productivity: use formulas, charts, sort data	https://support.google.com		Free with Google account		Some	
Keynote	Presentations						None	
Asana	Work management	Work management tool. Assign tasks, track progress, share updates and communicate. Automated templates and features to streamline data input and workflow					Some	Has different templates and tools for Agile, like Kanban boards and tracking user stories.
Agile	Word processing Spreadsheets Presentations Work management Documentation Methodology	Project management approach in which project phases overlap and tasks are completed in iterations					Some	

Step 5: Continue adding tools

Continue to add more tools and information that's relevant to your career goals. Search job listings and add tools, software, or specific knowledge needed for jobs you're interested in.

Look for more tools in job listings

Minimum qualifications:

- Bachelor's degree or equivalent practical experience
- 1 year of work experience
- Experience using GoogleSQL, DataStudio, Looker (or other Data Visualization tools)
- Experience in data driven roles, working with stakeholders, providing business centric insights, and using analytics tools and reporting platforms

Preferred qualifications:

- Experience in developing new models, methods, analysis, and approaches using analytics tools and reporting platforms
- Proven ability to consistently and positively contribute in a high-paced, changing work environment, with the ability to prioritize multiple functions efficiently
- Ability to proactively adjust and improve processes that will benefit not only our customers, but also the internal executives and sales teams
- Strong verbal and written communication skills to deliver findings of analysis
- Effective organizational skills, with careful attention to detail and the ability to handle multiple stakeholders

Apply

Key takeaway

If you've followed the steps laid out in this reading, you'll be able to develop a tracker that is useful to you as you continue on your project manager journey. Knowing what tools are available, what their benefits are, which ones are used for certain types of projects, and which ones you're skilled at will build your confidence. You'll be able to demonstrate to employers that you have an understanding of the industry, even if you're applying for your first project management role.

4.3.8 Reflection: Project tools

Scenario:

As the project manager of a new project, you decide which scheduling, productivity, collaboration, and work management tools the team will use. For the project, you will have eight team members and four remote stakeholders. You expect the project to take around six months to complete. There are a dozen deliverables and over 100 tasks.

List at least one scheduling tool to keep the project on track. In 1-2 sentences, describe how you can use the tool.

- Smartsheet to maintain the project's schedule, resources, and budget
- Google Sheets to create task lists and project plans, and analyze data with charts

List at least two productivity and collaboration tools to achieve tasks and better communicate with the team and stakeholders. In 1-2 sentences, describe how you can use each tool.

- Cloud Storage such as Google Drive to store documents online
- Email such as Gmail or Outlook to send emails to vendors
- Chat tools such as Slack to better communicate with your team members and stakeholders
- Video conferencing tools such as Zoom or WebEx to host online meetings
- Comprehensive tools like Microsoft Teams or Google Workplace to streamline productivity and collaboration

List at least one type of project management software—also called work management tools—to plan, track, and complete work. In 1-2 sentences, describe how you can use the tool.

Asana, Trello, Monday.com, or Basecamp to help organize the work and visualize the team's tasks. Remember that work management tools, such as Asana, often provide a lot of features. They may include the scheduling and productivity tools you need to complete your project.

Weekly Challenge 4

1. Project managers use tools to accomplish which of the following activities? Select all that apply.

- Carry out team-building exercises
- Manage the budget

 **Correct**

- Negotiate with vendors
- Keep stakeholders informed

 **Correct**

- Build charts and diagrams

 **Correct**

2. You have an idea to improve the employee engagement initiatives at your company. What kind of document should you create to present the idea?

-
- Project framework
-
- Project charter
- Project proposal
-
- Project plan

 **Correct**

3. Fill in the blank: A project manager creates a project charter _____ a project proposal.

-
- as an introduction to
-
- at the same time as
-
- before
- after
-

 **Correct**

4. What are the two types of documents typically created in the initiation phase of a project? Select all that apply.

Project charter

 **Correct**

Project plan

Project retrospective

Project proposal

 **Correct**

5. As a project manager, you introduce a new tool to the team on Monday and tell them to be ready to use it by Wednesday. Your team members are resistant to using it. They also report that technical issues with the software are keeping them from completing tasks. What three steps could you do next time to ensure a smooth transition? Select all that apply.

Set up training for the tool before the team uses it.

 **Correct**

Test the tool thoroughly before rolling it out to the team.

 **Correct**

Introduce the tool to the team earlier than on Monday.

 **Correct**

Have the team take an online training course after introducing the tool.

6. Work management tools primarily help a project manager complete which two tasks? Select all that apply.

Quickly communicate with team members

Assign roles to team members

 **Correct**

Build documents, such as meeting agendas

Track and visualize the team's progress

 **Correct**

7. Digital documents, such as Google Docs or Microsoft Word, help a project manager complete what three tasks? Select all that apply.

Outline project scope and next steps

 **Correct**

Track and review team processes

 **Correct**

Create agendas

 **Correct**

Chat efficiently with the team

8. As a project manager, you work with teams in different departments. You need to get answers quickly to project-related questions. What tool should you use to communicate efficiently with these teams?

Team chat

Shared document

Work management tool

Presentation tool

 **Correct**

9. In project management, the people who help execute the project are also referenced as what?

Resources

Tools

Materials

Budget

 **Correct**

10. Fill in the blank: Since the project manager uses the project charter throughout the project, it acts like a _____ for the project.

compass

bank

storage unit

main communication channel

 **Correct**

Glossary - Terms and Definitions

A

Adoption: Refers to how the customer uses and adapts a product or service without any issues

Asana: A work management platform that helps teams plan and coordinate their work; useful for building project plans, assigning tasks, automating workflows, tracking progress, and communicating with stakeholders

B

Benchmark: A point of reference

Benefits: Expected gains of a project

Budget: An estimate of the amount of money a project will cost to complete

Business case: The reason for initiating a project

C

Collaboration tools: Tools used to quickly and efficiently check in with team members on questions, comments, and other topics related to a project

Conditional formatting: A feature that adds automatic color coding to cells in a spreadsheet

Cost-benefit analysis: The process of adding up the expected value of a project—the benefits—and comparing them to the dollar costs

Customers: The people who will get some value from a successfully-landed project

D

Data validation: A feature that adds dropdown lists to cells in a spreadsheet

Deliverable: A tangible outcome from a project; what gets produced or presented at the end of a task, event, or process

Docs: A digital word processing application

E

Engagement: Refers to how often or meaningful customer interaction and participation is over time

F

Function: A feature that generates formulas which can be used to manipulate data and perform calculations in a spreadsheet

G

Gantt chart: A horizontal bar chart that illustrates a project's tasks, with clear breakdowns of who's responsible for the work and when those tasks are due

H

Header: The top cell or cells in a column in a spreadsheet

I

Influence: Measures how much power a stakeholder has and how much the stakeholder's actions affect the project outcome

Initiation: The first phase within the project life cycle, followed by planning, executing, and closing

In-scope: Tasks that are included in the project plan and contribute to the project's goal

Intangible benefits: Gains that are not measurable or quantifiable, such as customer or employee satisfaction or brand recognition

Intangible costs: A cost that cannot easily be quantified, such as loss of employee morale or brand damage.

Interest: Refers to how much the needs of the stakeholder will be affected by project outcomes

K

Key results: The part of an OKR that describes measurable outcomes that objectively define when the objective has been met

Key stakeholders: The people with the highest amount of influence on and interest in a project; also called "key players"

L

Land: To measure the success of a project using the success criteria established at the outset of the project

Launch: To deliver the final result of a project to the client or user

M

Materials: Items needed to help get the project done

Metrics: Data used to measure something, like numbers or figures

O

Objective: The part of an OKR that defines what needs to be achieved and describes a desired outcome

Objectives and key results (OKRs): A combination of a goal and a metric to determine a measurable outcome

Out-of-scope: Tasks that are not included in the project plan and don't contribute to the project's goal

P

Pivot table: A basic analysis tool used to summarize data and show the relationships between data points, making it easier to understand the information contained in a spreadsheet

Power grid: A two-by-two grid used for conducting a stakeholder analysis; shows stakeholder interest in the project versus their influence over the project

Primary stakeholders: People who will benefit directly from a project's success

Productivity tools: Tools used to manage project tasks, including word processing software, spreadsheets, and presentations

Project charter: A document that clearly defines the key details of a project

Project goal: The desired outcome of a project

Project manager: The person who plans, organizes, and oversees the whole project

Project proposal: Documentation written at the beginning of a project; kicks off the initiation phase by influencing and persuading the company to move forward with the

project

Project sponsor: The person who's accountable for the project and who ensures the project delivers the agreed-upon business benefits

R

RACI chart: A visual that helps to define roles and responsibilities for individuals or teams to ensure work gets done efficiently; lists who is "responsible," "accountable," "consulted," and "informed" for project tasks

Return on investment (ROI): A metric used to calculate the return on an investment relative to its cost.

Resources: The budget, people, materials, and other items needed for a project

S

Scheduling and work management software: Tools used for assigning tasks to multiple teammates and for tracking and visualizing progress; most useful for bigger projects with a larger number of tasks and a bigger team of people to manage

Scope: The boundaries of a project; an agreed-upon understanding as to what is included or excluded from a project

Scope creep: Changes, growth, and uncontrolled factors that affect a project's scope at any point after the project begins

Scope management: Understanding and negotiating how changes will be evaluated, accepted, and performed

Silo: A situation in which the knowledge and responsibility for a task falls on one person

Secondary stakeholders: People who are indirectly impacted by a project's success

Slides: Google's digital presentation application

SMART goals: A method to evaluate goals; states that goals should be "specific," "measurable," "attainable," "relevant," and "time-bound"

Spreadsheet: A tool used for organizing, transforming, visualizing, and manipulating information; useful for a wide range of tasks, such as creating timelines, building charts, managing budgets, and tracking tasks

Stakes: The important parts of a business, situation, or project that might be at risk if something goes wrong

Stakeholders: Anyone involved in the project who has a vested interest in the project's success

Stakeholder analysis: A visual representation of all the stakeholders that illustrates which stakeholders are taking on which responsibilities; also called "stakeholder mapping"

Stakeholder buy-in: The process of involving stakeholders in decision-making to hopefully reach a broader consensus on the organization's future

Steering committee: The most senior decision-making body on any project; they have the authority to make changes to the budget and approve updates to the timeline or scope

Success criteria: The standards that measure how successful a project was in reaching its goals

T

Team members: The people doing the day-to-day work and making the project happen

Tools: Aids that make it easier for a project manager or team to manage resources and organize work

Triple constraint: The combination of the three most significant restrictions of any project: scope, time, and cost.