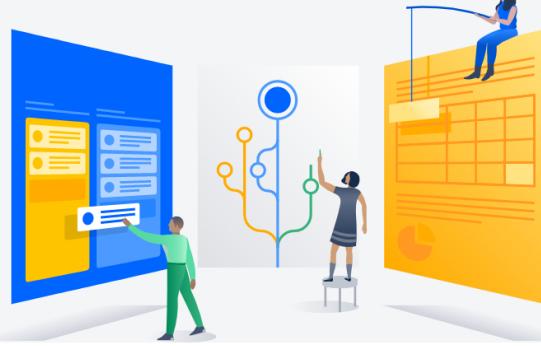


# Project management for non-project managers

The steps, skills, and troubleshooting techniques you'll need to deliver the goods without losing your mind.



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## What is project management?

Project management is the art of making a plan, then executing on it. But if only things were really that simple... You'll need to rally a project team and track their progress. You'll need to manage expectations. You'll need to anticipate avoidable problems, and troubleshoot the ones you didn't see coming.

If that sounds overwhelming, you've come to the right place. Here you'll learn tips and techniques for each phase, as well as downloadable templates that'll make life a little easier. Consider it a bit of free project management training. Ready? Let's get started.

## Project management skills



### Communication

It's hard to over-communicate. Team members need clarifications, stakeholders need status updates and sponsors need the results.



### Time management

Aside from managing the project's schedule, you'll need to keep meetings on track (and manage your own time, too).



### Problem solving

You probably solve lots of problems in your regular role – keep that "creative thinking" cap on!



### Organizational awareness

Get familiar with other projects that might need the same people and resources at the same time you're going to need them.



### Diplomacy

Be prepared to negotiate scheduling snafus, conflicting priorities, and personality clashes with grace.



**Pro tip:** The most important skill is the ability to set aside your usual job, and embrace your role as the project's manager.

## Project management steps

If you're an "accidental project manager", there's a good chance the project was already underway when it landed on your plate. Jump to whatever step you're on using the links below to figure out what your next move is. And don't forget to check out earlier steps to see if there's any clean-up to take care of.



### Envision it



### Plan it



### Execute it



### Deliver it



### Improve it

#### Step 1: Envision it

Don't rush through this phase. Iterate on your understanding of the problem space, and potential solutions, until you're confident you're on the right track.



#### Build the business case

Define the problem you're trying to solve, and the value in solving it. Talk to your target customers, whether internal or external, so you fully understand the problem space. When building a business case for your project, focus on what you want the customer to be able to do. Leave the specifics of how for when you brainstorm solutions with your team.



#### Recommended activities:

- **Problem framing** – Explore a problem space and its affect on customers.
- **Customer Interview** – The ultimate empathy-builder.



#### Form the project team



#### Define "success"

Agree on *measurable* outcomes to shoot for, and metrics to track your progress toward them. Make sure the project contributes to larger objectives the business is pursuing. If it doesn't, this might be the wrong project (or it might be the right project, but at the wrong time).



#### Recommended activity:

- **Goals, signals, measures** – Set goals as a team and agree on how you'll measure progress.



#### Brainstorm solutions

Fire up your problem solving skills. Now is the time to think about specific solutions, how you'd implement them, and how the customer will interact with the final product. Involve your team, and be ambitious at this stage. It's easier to pare down a bold idea than to turn a safe idea into something innovative.



#### Recommended activities:

- **Disrupt** – Generate a long list of great ideas in a short time.
- **Mindmapping** – Explore different facets of a problem, and organize your ideas for solutions.



#### Prototype and test

Depending on the nature of your project, a prototype could be anything from flowcharts on the back of a cocktail napkin to quick-n'-dirty (but working) code. Put it in front of your target customers and stakeholders for early feedback. This is the ideal time to fail and adapt!



#### Recommended activities:

- **End-to-end demo** – Visualize your concept so it's easy to get feedback.
- **Experience canvas** – Make sure your concept is user-focused, feasible, and valuable to both the customer and the business.

### Signts your project is at risk during the envision step

#### THE PROJECT'S VALUE IS UNCLEAR

##### How to get back on track

Choose a specific customer persona (whether internal or external customer), and turn on your empathy. Imagine why they would want this, then map that to the company's larger goals. Iterate until you've got customer value with strong ties to business value.

#### Recommended activities:

- **5 "whys"** – Give your team a deep understanding of the problem and its impact on your customer.
- **Customer Interview** – Understand your customers' needs and the contexts in which they're using your product or service.
- **Experience canvas** – Make sure your project is customer-focused and makes sense for the business.



Ready to try the experience canvas? Here's a template to help get you started.

[Download template](#)

#### GOALS OR PRIORITIES CONFLICT

##### How to get back on track

Agree on one (yes, one) objective to serve as your North Star for the project. Then sort through the conflicting priorities with that in mind. When you encounter trade-offs, prioritize the option that'll get you closer to that North Star objective.



##### Recommended activities:

- **Goals, signals, measures** – Make sure the project stays focused, and you know what a successful outcome looks like.
- **Trade-off sliders** – Create sliding scales to show how important each metric is and agree on what you should prioritize.

#### NOBODY KNOWS WHO IS IN CHARGE

##### How to get back on track

Reach a shared understanding across the project team, stakeholders, and sponsors as to who is ultimately accountable. As project manager, you're responsible for delivering the project on time and on budget – but you might not be on the hook for the project's overall success.



Ready to try the DACI framework? Here's a template to help get you started.

[Download template](#)

##### Recommended activities:

- **Roles and responsibilities** – Define each person's role on the project, and what's needed of them so the team can be successful.
- **Project kick-off** – Build a shared understanding of the project's main objective, scope, value, timing, and decision ownership.
- **DACI decision-making framework** – Understand who's accountable for specific decisions, and what role the rest of the team will play.

#### THE PROJECT TEAM CAN'T AGREE ON A DIRECTION

##### How to get back on track

First, make sure your team truly understands the problem you're solving and its impact on the customer. And don't be afraid to ask management to clarify what's a priority for the business vs. what's not. When seeking guidance, make sure to present them with options you're considering, instead of an open-ended "what should we do?".



##### Recommended activities:

- **Problem framing** – Explore the problem space and its impact on customers.
- **Demo trust** – Create a space for open discussion and feedback from company leaders so everyone feels confident about the value and direction.



**Pro tip:** Run a Health Monitor™ workshop with your team – the earlier in the project, the better. It's a chance to self-assess on eight attributes common amongst healthy, high-performing teams.

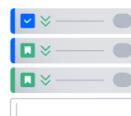
## Step 2: Plan it

The planning process should be relatively short. While we recommend an iterative approach to planning, there are a few high-order tasks before moving into project execution mode.



### Nail down the project's scope

Based on feedback from early testing, and keeping your success metrics in mind, prioritize what to include in the project. Be clear about the trade-offs you're making. For example, optimizing for ease of use might mean pushing out the schedule or increasing the budget.



##### Recommended activities:

- **Trade-off sliders** – Create sliding scales to show how important each metric is and agree on what you should prioritize.
- **Journey mapping** – Understand the existing journey so you can design a better experience.



### Understand and manage dependencies

Does your project depend on work, resources, or assets from outside the core project team? Map those out, noting who will own each piece of work and when they're available to do it. Even if you can't resolve bottlenecks at this stage, you need to identify them and factor them into the project planning process.



**Recommended activities:**

- **Roles and responsibilities** – Define each person's role on the project, and what's needed of them.



**Build a roadmap and backlog**

With scope agreed upon and dependencies understood, break the project plan down into discrete pieces of work, and estimate the time and effort required for each. From there, you can project when you'll hit major milestones and set a target completion date. Then collect all pieces of work into a backlog you can use to plan in short, iterative cycles.



**Recommended activity:**

- **Roadmap planning** – This exercise comes from the software world, but can be adapted to suit any project.



**Anticipate and mitigate risks**

Save yourself from headaches down the road. Think through ways the project might fail, and dive into prevention mode. Also identify chances for mind-blowing success that you haven't yet considered – missed opportunities are a form of risk, too.



**Recommended activities:**

- **Pre-mortem** – Imagine what could go wrong, and make plans to prevent them.



**Make a communications plan**

Establish a cadence for team meetings and updates to stakeholders, and share it around. (Bonus points if you can keep the meetings to a minimum!) Then schedule any recurring meetings, and put reminders on your calendar to update the project's plan and dashboard (or internal homepage) regularly.



**Recommended activities:**

- **Stand-ups** – A daily opportunity for your team to share the status of work in progress and discuss blockers.
- **Project poster** – An easy way to share your goals, status, and schedule. If updated regularly, the poster serves as your status report (but far less painful).

**Signs your project is at risk during the planning step**

**YOU'RE STUCK IN PLANNING MODE**

**How to get back on track**

Shake off that "analysis paralysis", and get going! If you're using an [agile approach](#) (and you really should), remind the project team you'll have chances to demonstrate progress and course-correct as you go.



**Recommended activities:**

- **Project kick-off** – Build a shared understanding of the project's main objective, scope, value, timing, and decision ownership.
- **Pre-mortem** – Visualize risks and opportunities for the project, then figure out how to navigate yourself away from (or toward) them.

**OTHERS DON'T UNDERSTAND WHAT YOUR PROJECT IS ABOUT**

**How to get back on track**

Call upon those communication skills and share small, frequent updates that are easy to digest – huge "walls of text" probably won't get read. Make sure you're sharing the right information in the right level of detail with the right people.



Ready to try the project poster? Here's a template to help get you started.

[Download template](#)

**Recommended activities:**

- **Elevator pitch** – Create a simple explanation of your project and the value it delivers to your customers.
- **Project poster** – Shape and share your ideas, articulate what success looks like, and build a shared understanding with stakeholders.

**YOUR PROJECT TEAM IS MISSING CRITICAL SKILLS**



#### How to get back on track

Re-shape your concept so you can move forward with the resources you have. (Problem solving skills FTW!) Throwing hands in the air and saying "We're blocked" will only diminish the trust stakeholders and sponsors have in your team.



#### Recommended activities:

- **Trade-off sliders** – The basic trade-off sliders exercise clarifies which aspects of a project are negotiable (and which aren't), but you can give it a twist. If you can't do "X", what other aspects of the project can flex to help you navigate the skill gap?



Spar on the high-level plan with your project team. It helps you gut-check what's realistic, as well as visualize dependencies and risks.

– Sarah Goff-Dupont, accidental project manager

### Step 3: Execute it

Finally, right?! Time to get \$#!t done. Work in 1- to 2-week iterations, with a demo for stakeholders and a team retrospective at the end of each cycle.



#### Work iteratively



#### Track your progress

This includes which pieces of work are complete, how much of the budget remains, and whether you're on track to meet your target delivery date. Use something digital like Google Docs, [Trello](#), or [Jira](#) so everyone can see your status easily. If you start burning through budget or time faster than projected, raise that with your sponsor and team right away so you can course-correct before things get out of hand.



#### Recommended activities:

- **Set up a Trello board** – Organize and prioritize your project in a fun, flexible way.
- **Set up a Jira dashboard** – The information your team and stakeholders need, in a custom layout.



#### Test and incorporate feedback

At the end of each iteration cycle, update your end-to-end demo to reflect the work completed, and show it to stakeholders (and customers, ideally). Capture their feedback so you can take it into account when planning the next iteration. You may want to re-work X before moving on to Y.



#### Recommended activity:

- **End-to-end demo** – Visualize your concept so it's easy to get feedback.
- **Sparring** – Let others challenge your own ideas and inspire new ones.

### Signs your project is at risk during the execution step

#### YOU'RE STEPPING ON EACH OTHER'S TOES

#### How to get back on track

Remove and prevent bottlenecks in your process. Clarify each person's role or area of responsibility on the project so you're not blocking each other or (eep!) doubling up on tasks.



#### Recommended activities:

- **Stand-ups** – Start the day with updates on who's-working-on-what, what got done yesterday, and which tasks each person intends to tackle next.
- **Roles and responsibilities** – Understand everyone's role on the team, and learn what teammates need from each other in order to succeed.

## FEELS LIKE YOU'RE JUST SPINNING YOUR WHEELS

### How to get back on track

Shine a light on everything your team is accomplishing. When you're eyeballs-deep in project work, it's easy to miss the forest for the trees. (And if you're truly not making progress, your next move is to figure out why.)



#### Recommended activities:

- **End-to-end demo** – Celebrate the incremental wins by iterating on a demo. As it evolves from diagrams to prototype to an MVP, your team's progress will feel more tangible.
- **Stand-ups** – Create a feeling of momentum by highlighting what got done yesterday (and/or expose the hard truth that nothing is getting to the "done" pile).

## SCOPE CREEP!

### How to get back on track

It depends. If your schedule and/or budget are flexible, you might opt to expand the project's scope. Otherwise, you'll need to deflect additional ideas or make trade-offs to accommodate them. Just don't skimp on the quality of work you deliver. Remember: for most projects, you can keep making improvements after you deliver the initial "minimum viable product" (MVP).



Ready to try the DACI framework for decision-making? Here's a template to help get you started.

[Download template](#)

#### Recommended activities:

- **Trade-off sliders** – Decide which aspects of the project you'll prioritize, and think through the trade-offs you'll make in their defense when new ideas are introduced.
- **DACI decision-making framework** – Agree on who makes the call and who contributes recommendations – either for individual decisions about scope, or for the project as a whole.

## COMMUNICATION HAS BROKEN DOWN



## ESTIMATES WERE WAY OFF-TARGET

### How to get back on track

Recalibrate your projected timeline based on the information you have about the actual effort needed to reach your milestones. Be open about this so stakeholders have a chance to adjust their expectations and any downstream plans.



#### Recommended activities:

- **Retrospective** – Set aside time in each retrospective to compare that iteration's estimates with the actual effort needed so you can continually recalibrate.
- **5 "whys"** – Start with one estimate-gone-wrong to analyze and ask why it was so off – then keep asking "why" until you've uncovered the root cause.



**Pro tip:** Remember those measurable goals you set? Make sure to build in any analytics or infrastructure needed to measure progress towards them.

## Step 4: Deliver it

You've completed all the work. You're all done now, right? Not quite. Closing out a project involves more than cancelling the recurring meetings (although that part *is* fun...).



### Deliver your "minimum viable product" (MVP)

This is it! Your work is finally ready for public (or internal) consumption. If your customers are internal, or clients with whom you communicate directly, make sure they accept the project as complete. Depending on how smooth or rocky the journey was, you may want to get their acceptance in writing. Then, have a little celebration with your team!



#### Recommended activities:

- **Celebrate!** – Did someone say "team lunch"?...



#### Close out the budget

Pay any outstanding vendor invoices, and if you were hired by an outside client, get your payment from them. Use the budget data you've been tracking throughout the project to create a report for your project's sponsor. Include analysis of where you'd spend more (or save) money on similar projects in the future.



#### Do a project retrospective

What went well? What went horribly, horribly wrong? What did we learn? Put these questions up for discussion with your project team. Be sure to capture the lessons learned and share them with your peers so they can benefit. And don't forget to chat about how you might improve on what you just delivered.



#### Recommended activity:

- **Retrospective** – Reflect on and discuss what works well (and what doesn't!) so you can improve. Mistakes are ok if you learn from them.



#### Get your brag on

Are you stoked about what you just delivered? Let's hope so! Write up a short company announcement describing the project and thanking your team. If the project is external-facing, you might want to share the news with customers by way of an email or blog post.



#### Signs your project is at risk during the delivery step

##### THE PROJECT ISN'T ACCEPTED AS "DONE".

##### How to get back on track

Time for those diplomacy skills. First, talk to your sponsor (or client, or team, or whomever is unhappy) and figure out where the discrepancy lays. Your goal for this conversation is to agree on a definition of "done" – something you should put in writing so it's easy for everyone to refer back to later. From there, draw up a list of tasks that'll close the gap between here and "done", and set your team on it.



##### Recommended activities:

- **Demo trust** – Use this as a forum for discussing "done" and next steps with your management team.



Whatever you delivered will live on, so have a post-launch plan in place. Who will support or maintain it? What metrics or reporting will you need to measure its success?

– Aumarie Benpayo, Atlassian program manager

#### Step 5: Improve it

Most "accidental project managers" are keen to get back to their regularly scheduled day job once the MVP is delivered. Even so, take a moment to consider these questions:

- 1 Have you achieved your definition of "success" for the project?
- 2 Are there ideas that were de-scoped from the MVP?

↗ If the answer to either question is "yes" or "no", keep reading.

#### Signs your project is at risk of not meeting its goals

##### YOUR MVP ISN'T BEING USED, AND YOU DON'T KNOW WHY

##### How to get back on track

Time for some user testing research. Talk to your target customers to find out



Ready to try empathy mapping? Here's a

Time for some quantitative research. Talk to your target customers to find out what's preventing them from putting your project to use. If it's appropriate for your project, set up a user test (either live, or using an online service) so you have a chance to observe their behavior as they interact with what you've delivered.

template to help you started.

[Download template](#)

**Recommended activities:**

- **Customer Interview** – Go straight to the source and ask what the hang-up is.
- **Empathy mapping** – Pair your quantitative data with your knowledge of the customer to understand how they think and feel about your project.

**INCREMENTAL CHANGES AREN'T MOVING THE NEEDLE**

**How to get back on track**

Go bold. This might mean a major pivot, or overhauling your project entirely. Don't get discouraged, though. Making one major change on your way to success puts your batting average at a respectable .500 (and hey: Babe Ruth's was only .342).

**Recommended activities:**

- **5 "whys"** – Use this analysis technique to uncover the root of the problem so you know what future changes need to address.
- **Disrupt** – De-calcify your neuro pathways and generate fresh ideas.



Ready to try a disrupt workshop? Grab this set of cards, and click the link on the left for full instructions.

[Download cards](#)

## Project management templates

For your convenience, we've gathered all the templates suggested throughout this page into one handy spot.



The experience canvas template helps you clarify your problem, solution, and customer persona.

[Download it](#)



Empathy maps template help you get inside your customer's head and see things through their eyes.

[Download it](#)



This set of "disrupt" cards will shake up your neuro pathways and help generate fresh ideas.

[Download it](#)



Use this DACI template to clarify each person's role in decision-making, and make right the call sooner.

[Download it](#)



If you hate project briefs and loathe project charters, try this template for a project poster instead.

[Download it](#)

## Project management software

So, turns out we build software that makes project management easier.

[Learn more](#)



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