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.

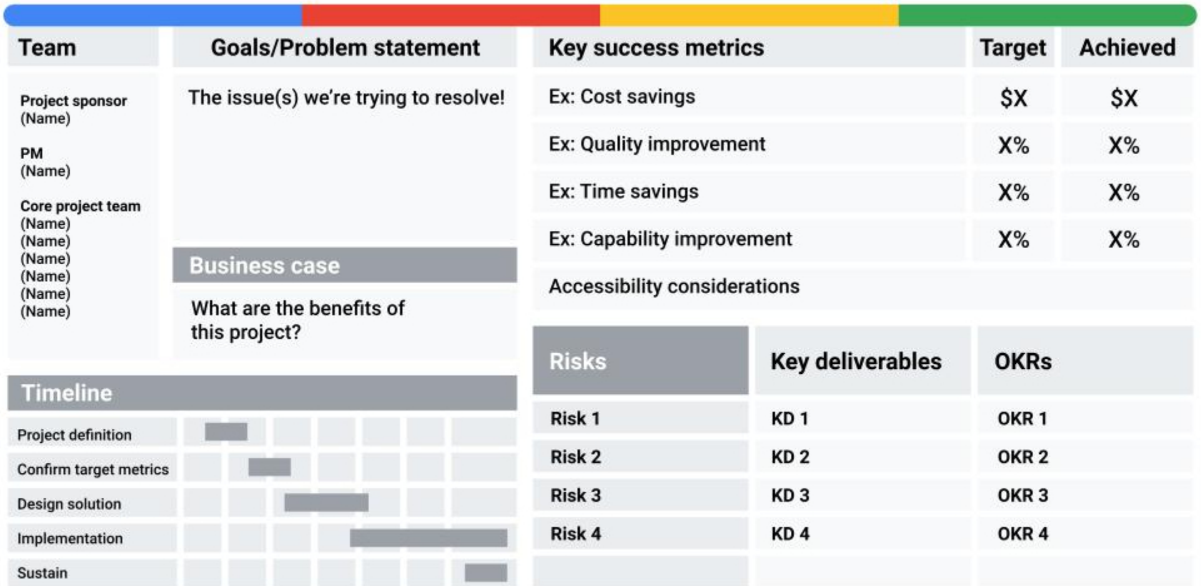
Project charters: Elements and formats
A **project charter** clearly defines the project and outlines the necessary details for the project to reach its goals. A well-documented project charter can be a project manager's secret weapon to success. In this reading, we will go over the function, key elements, 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.



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

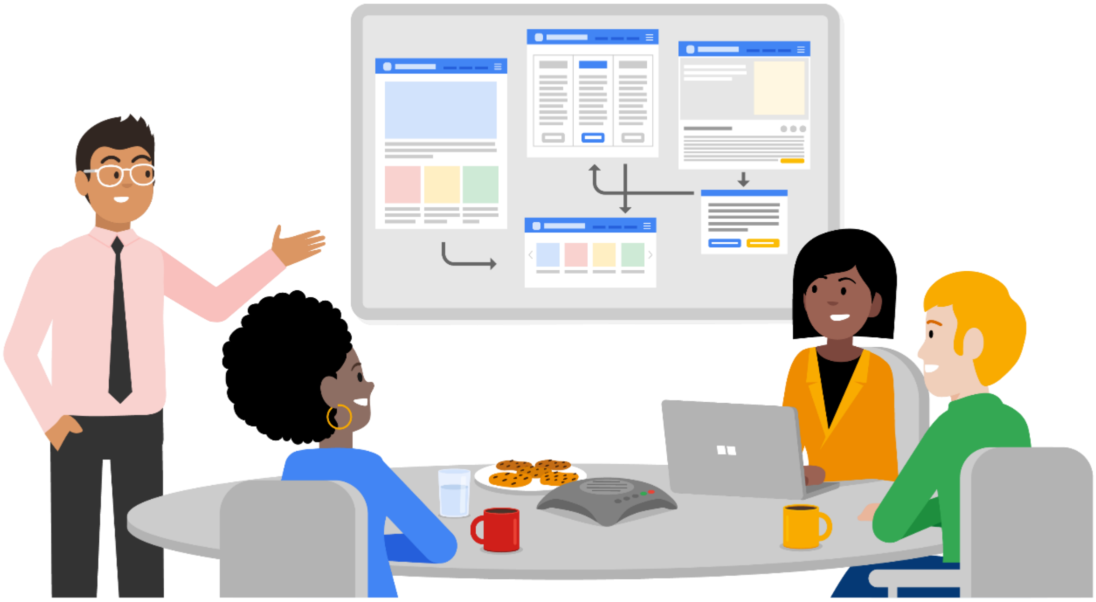
Your organization may have a unique template for you to use, or you may have the flexibility to leverage one you come across in your career. As your project progresses, you may also encounter revisions to your project charter—and that is okay. Remember, it is a living document; let it grow with your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

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 <u>before</u> 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 <u>before</u> 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.

Using Google Sheets for project management

Essential Sheets features for project management

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

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

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

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

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

Using spreadsheet templates for project management

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

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)