




Project Management: Introduction and Tools

ILiADS 2021

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What is Project Management?


- 
- Use of tools or organizational approaches to complete a project
 - Help teams scaffold project work and identify goals
 - Communication is key!
 - Details are key!
 - Not one size fits all -- **customize and be realistic** about your project needs and what can be practically implemented



Project Management in 3 (major) steps

1. **Define** your project
2. **Plan** your project (in detail!)
 - a. Define explicit tasks (as many as you can)
 - b. Timeline
3. **Implement** your project

Managing a Digital Scholarship Project

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- Checklist: Planning a Digital Scholarship Project (Tulane)
 - Checklist / Questionnaire to help you think through all aspects of your digital scholarship project
 - PM4DH: Project Management for the Digital Humanities (Emory)
 - Detailed curriculum specific to managing Digital Humanities projects
 - Broken into stages:
 - 1. Proposal; 2. Initiation; 3. Planning; 4. Execution; 5. Closing
 - Special Collections Digital Project Toolkit (UCLA)
 - Breaks down digital project development into detailed steps
 - Includes many useful document templates

Methodologies



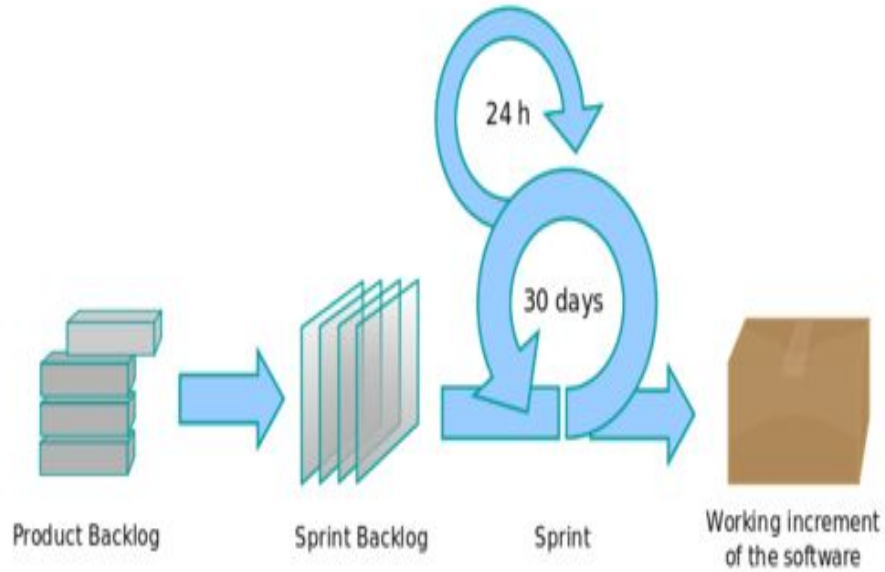
Agile vs. Traditional Methods

Agile

- Iterative and cyclic
- Development / implementation happens incrementally
- **AKA scrum**
 - Scrum development occurs in small pieces ("sprints") that build on one another
- Regular (smaller) deliverables
- Allows you to re-define

Traditional

- **AKA waterfall**
- Sequential approach - progress as phases are completed
- Can be difficult if you / stakeholders don't know exactly what they want
- Major deliverable timelines



Agile with scrum

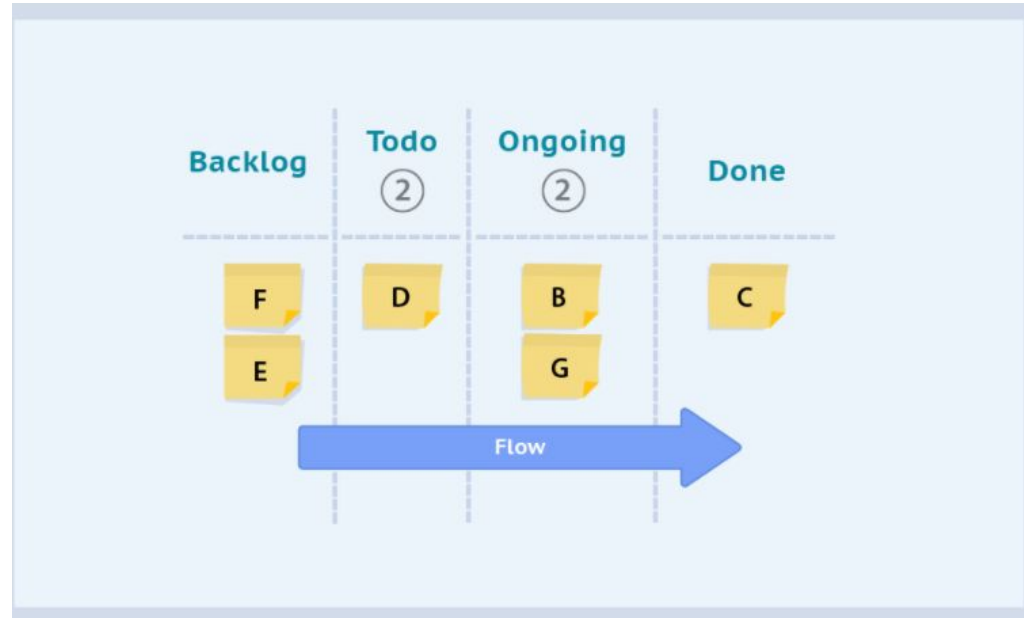
vs.



Waterfall

Kanban (visual PM tools)

- Not official methodology -- system to improve workflow
- Example: Trello



Tools



Project Management Tools

Should help you:

- Track & assign tasks
- Collaborate
- Share documents

Consider: features you need and **if all team members can use (or will use) the tool**



Find a tool that works for you!

Monday

Trello

Clubhouse

Wrike

ProofHub

Notion

[Choose The Best Project Management Tool In 9 Easy Steps](#) (Hive)



Trello

Task management software with built-in collaboration tools to work with your teams. It's lightweight, simple, and straightforward to use.

<https://trello.com/guide>



Notion

Application that provides components such as notes, databases, kanban boards, wikis, calendars and reminders. Users can connect these components to create their own systems for knowledge management, note taking, data management, project management, among others.

<https://www.notion.so/projects>



Monday

An open platform where anyone can create the tools they need to run every aspect of their work.

<https://monday.com/>




Clubhouse

Intuitive and easy-to-use task management platform for software teams. This streamlines their workflow as they are able to display every step in the process across the board and inform their teammates of bugs and other issues.

<https://clubhouse.io/>

Takeaways

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- Start slowly & use learning resources
 - Talk with others (scholars, librarians, technologists, etc.) to see all angles & seek advice
 - Document decisions and processes as if a team member might leave at any time
 - Communication is key!
 - Be realistic: what does your project *need* and what can you expect everyone on the team to *do*?



Resources

- [Checklist for planning a Digital Scholarship Project](#) (Tulane)
- [PM4DH: Project Management for the Digital Humanities](#) (Emory Center for Digital Scholarship)
- [Special Collections Digital Project Toolkit](#) (UCLA)
- [Project and Research Management](#) (Trinity College)
- [Choose The Best Project Management Tool In 9 Easy Steps](#) (Hive)
- [Project Management Methods Explained](#) (Forecast app)