

PROJECT MANAGEMENT CARDS



PROJECT MANAGEMENT FOR modern TEAMS.

The way you work together in a project is a strategic choice that affects your team's morale and deliveries. Sticking blindly to a single PM methodology leaves you unable to adapt to new circumstances. Most methods are also slow to adopt and not very fun.

In these cards, you'll find 30 **quick-to-adopt** mindsets and tools extracted from the different schools of project management.

Use these cards to quickly **co-create, adapt or rethink** your team's own way of working. Any combination of a small number of them should result in a lightweight, modern and flexible project management style.

PROJECT MANAGEMENT CARDS

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Visit pmcards.github.io for more info!

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TOOLS for **INITIATING**

| 5W2H

PLANNING

WBS
Critical Chain
Expert Review
Risk Management

EXECUTING

Kickoff Meeting
Kanban
Frequent Updates
Pair Working
Make it Social
Actionable Help
Thinking Hats
Design Sprint
Quality Sprint

MONITORING

360 Feedback
Control Point
Critical Chain (Again)
Expert Review (Again)

ENGAGING

One-on-ones
Task Rel. Maturity
Celebrate Every Win
Tribal Language

CLIENT RELATIONS

| Customer Serv. Basics

MINDSETS for

PLANNING

Throw less @the Prob.
Focus on Deliverables
Use People's Strengths

EXECUTING

Good Leader + Cycles
Min Viable Deliverable
Decisions are Progress
Editor/Operator

MONITORING

Tell your baby it's ugly
Openness & Respect



TOOL for INITIATING 5W2H

Before you start planning your project, use these 7 questions to have it well defined.

Start answering who wants what and why.

Validate answers with your client/users. Then find out when (& where) it has to be delivered and how much can be spent in resources.

Consider criteria for success, if it can be done by your team and if it is worth it. Finally, decide with your team how it will be done.

TIPS:

- Streamline this process and these questions for your line of work and turn this into a handy document;
- After answering all questions, consider redefining, this time with more detail, WHAT will be ultimately delivered.

BREAKDOWN STRUCTURE

OK O' EVERYTHING

AWESOME
SYMPOSIUM

LOGISTICS
(L.F.E.)

Room

NOSH

DATE
+ TIME

EVENT

PRESEN-
TATIONS

QUESTIONING

DISCUSSION

HANDOUT
(CD-ROM?)

TOOL for PLANNING

WBS

A Work Breakdown Structure is a hierarchical tree-like decomposition of all the work that must be done in a project into smaller blocks until it is defined as individual work packages that can't be broken down any further. **Each topic in your WBS should represent a deliverable or a result.**

TIPS:

- Don't describe actions in your WBS. Doing so means work may exceed or fall short of the actual scope (set of deliverables and results) of the project. It also means that team members can't take any liberties on the way work gets done;
- No individual work package should require more than 80 hours of effort or take longer than a single reporting period;
- All the work described in the WBS should be no more and no less than the work required to deliver the project;
- Use a "1.2.1." coding scheme to facilitate recognition of WBS elements in documents or spreadsheets, where the hierarchical relations aren't as visible as in a drawing;
- Evaluate/describe item's dependencies, duration & resources (incl. team members) to turn your WBS into a full project plan.



TOOL for PLANNING and MONITORING CRITICAL CHAIN

Assign a duration and resources to each task in a WBS. Then adjust the durations & the start-end dependencies of tasks in order to balance the use of resources.

The critical chain is the sequence of interdependent tasks with the longest duration. The duration of each task should consist of an aggressively short duration (the task should have a 50% probability of being completed in that time) and a safety buffer.

Monitoring is done by evaluating the consumption of buffers.

The [Wikipedia page on CCPM](#) gives a good overview of this method.

WHY IT WORKS:

- The aggressive durations add pressure to focus and complete tasks, especially those on the critical chain, as soon as possible;
- Monitoring buffers is easier and doesn't require constant adjustments to start and end dates.



TOOL for PLANNING and MONITORING EXPERT REVIEW

Save time during the beginning of the project by hearing an expert's or mentor's thoughts on possible options.

In later stages, ask an expert for feedback to **improve the quality of deliverables**.

TIPS:

- Schedule the date of a review before the actual deadline of a certain deliverable so that you can motivate yourself to deliver something earlier than needed.



TOOL for PLANNING RISK MANAGEMENT

There are a number of things that can affect your project. Risk management is about working so that these things don't affect you.

First, you need to identify possible risks and assess their impact and probability.

Then you need to manage them: come up with plans to prevent the risks that are worth preventing.

If you're having trouble, Wrike's ultimate guide to project risk ([Part 1](#) and [Part 2](#)) quickly give you everything needed to get started.



TOOL for EXECUTING KICKOFF MEETING

A manager needs to establish a lot of things in a project. To do that, a great manager will use one-on-ones and written communication instead of a big team meeting.

But team members also need to establish a few things with each other, some of which don't even matter to a manager. Things like how they'll meet for a specific decision and how they'll help each other in specific moments.

A great manager uses a kickoff meeting as an environment for team members to have these conversations.

TIPS:

- Look for ways to promote conversations, like bringing a visual version of the project plan or going to an ice cream shop;
- The larger the team, the more planning will be needed to make a meeting that truly helps team members have the conversations that are required to start the project properly.



TOOL for EXECUTING KANBAN

Maintain a single board of tasks for the entire team with three rows: **to-do, doing & done.**

It's easy to adopt, very adaptable and comes with a lot of benefits when used correctly.

HOW TO APPLY:

- Consider splitting the “to-do” row in two: “backlog” and “do”;
- The Kanban board is not the place to display your full project plan. To keep your team focused, keep the board clean: regularly add the next few tasks and remove completed ones;
- When each task is short and well defined, Kanban makes work fun because it allows team members to regularly see the impact their work had in moving the tasks along the board;
- The biggest benefit from using Kanban comes from only allowing a few (2-4) tasks to be worked on at once. This makes it so that before someone in your team can start a new task, they have to help someone else complete an old one first. As a result, no task takes too long to be completed.

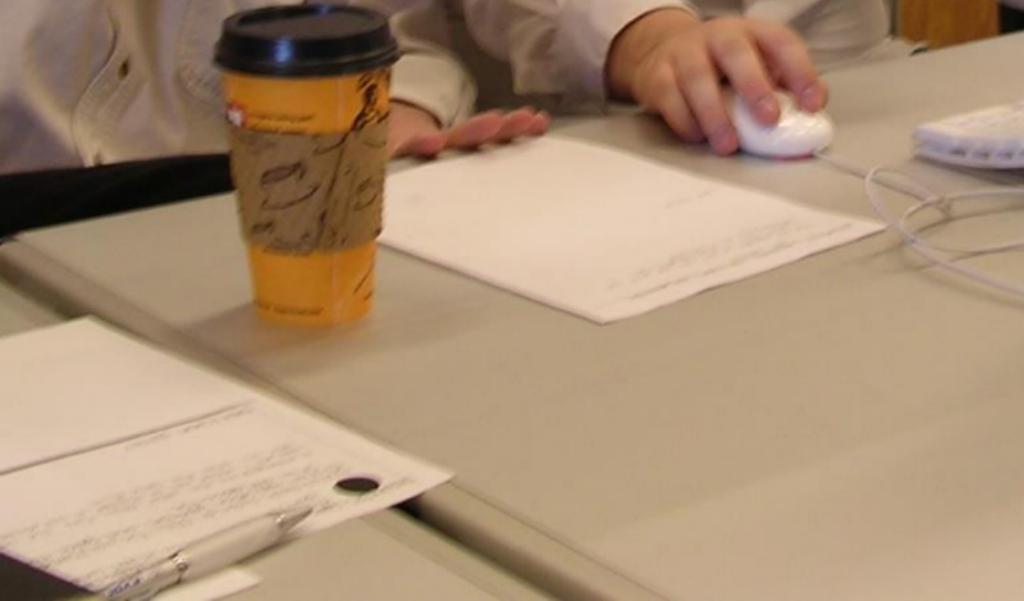


TOOL for EXECUTING FREQUENT UPDATES

To be productive, team members need to always have important information available.

They also need to feel comfortable reaching out to managers just as managers need to feel comfortable informing teammates about deadlines, changes and problems.

The simplest way to do that is for the team manager or leader to **develop a habit of giving frequent, tailored & personal project updates to each team member, even if there is nothing new to say.**



TOOL for EXECUTING PAIR WORKING

Have two team members work on the same task and on the same screen. One of them, **the driver**, does the work, while the other, **the navigator**, reviews the work and gives ideas. The two switch positions regularly.

When the task is simple or the pair has different skill levels, this lowers the productivity, as one of them will assume a “watching” role. **But when the task is complex and the pair has the same skill level, this increases the productivity, as work becomes much more engaging for both team members.**

Known as Pair Programming in the software industry.



TOOL for EXECUTING MAKE IT SOCIAL

Working with friends is fun, so work as a group of friends. When work isn't very enjoyable, spending time with friends is one of the few reasons to still work.

Leave the office and with it, leave distractions like meetings, management and politics behind. Go somewhere where team members can feel comfortable, play music, have drinks and eat snacks. Schedule social activities as excuses to arrive early and stay late.



TOOL for EXECUTING ACTIONABLE HELP

Need help or feedback from a client, user or someone else from your organization?

Give them actual instructions, a series of actions they can do to help you, and **they'll be much more likely to give actual help.**



TOOL for EXECUTING THINKING HATS

Have more productive discussions by asking each team member to think from a certain perspective, represented each by a “Thinking Hat” of a certain color:

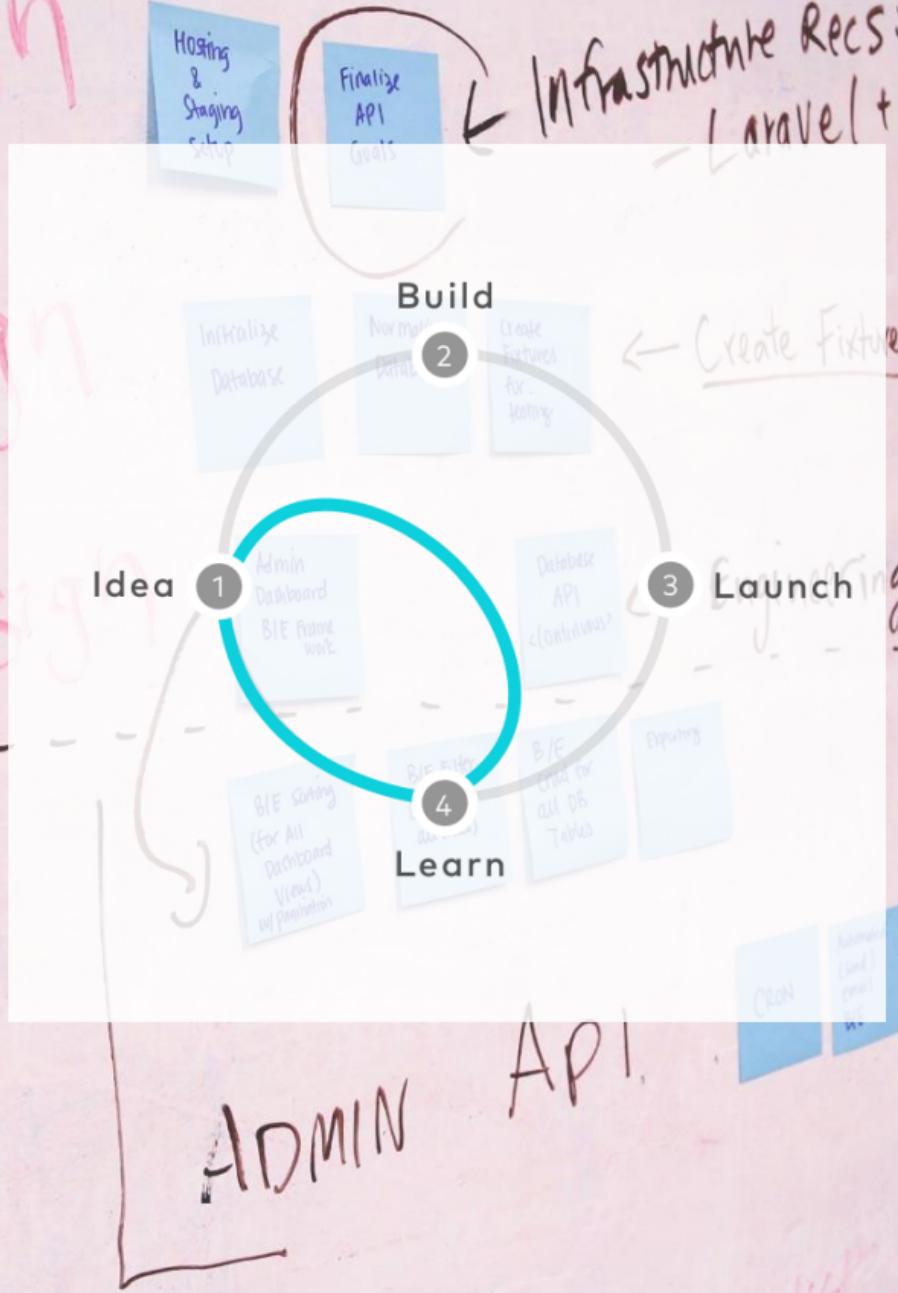
Yellow – Creative: What are the alternatives?

Black – Pessimist: What could go wrong?

Green – Optimist: What are the benefits? How can we still make it happen?

Blue – Technical feasibility: Is it even possible?

Red – Client/User Advocate: How does our client/user feel about this? (Can also roleplay as the client or user)



TOOL for EXECUTING DESIGN SPRINT

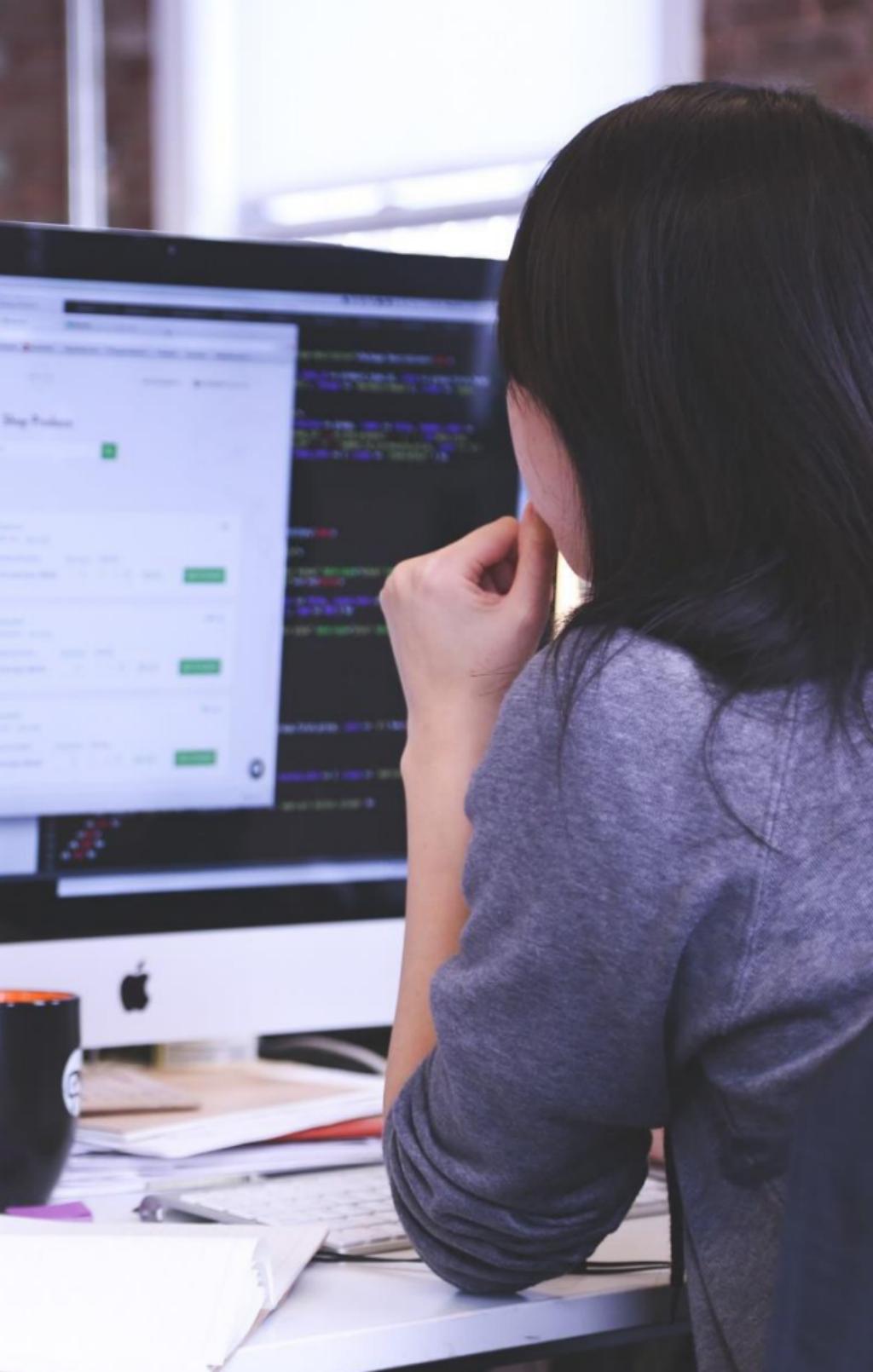
Understand the problem, come up with solutions, choose a few to work on, prototype them and finish validating. **Solve a real challenge (and learn a lot in the process) with a single event spanning a few days.**

Useful to quick-start or pivot a project. Also good for getting the whole team together to solve any particularly hard problem.

Requires someone to plan and facilitate.

TIPS:

- The sprint is adaptable to different objectives. It can be used to generate & validate a ‘prototype’ (a first or new version) of anything you might have to deliver in your project.
- Resources for planning a sprint are available at gv.com/sprint/ and at developers.google.com/design-sprint/.



TOOL for EXECUTING QUALITY SPRINT

Great for projects which are nearing completion. Invite everyone to dedicate a full day to improving the quality of what will be delivered.

Let team members individually go through all completed work on the project and make any improvements they'd like. **Commemorate together whenever an improvement is made.**

TIPS:

- Leave the office, bring snacks and make it a 'social' event so that it is easier to forget everything else and focus solely on improving the quality of work that was already finished.



TOOL for MONITORING 360 FEEDBACK

With 360 feedback, every team member evaluates every teammate.

In a project, the biggest benefit of using 360 feedback is showing people how they impact other team members, so they can correct their behaviors.

Typically the manager or leader will collect the responses through an anonymous paper or online form and share with each teammate their individual results.

TIPS:

- 360 feedback is used in organizations for professional development, usually making use of long forms. In a project, a short form, with just enough questions so that people have things to say, may be more useful.

16 DO

17 FR

18 SA

19 SO

TOOL for MONITORING CONTROL POINT

On most projects, it's healthier for the team's productivity to not have any heavy-handed monitoring being done on a daily basis. But it might still be important to have some more thorough & planned for monitoring from time to time.

A control point is when you plan several monitoring practices to be done on the same day. It's often right after the extended deadline of important deliverables.

Between peer & expert reviews, retrospectives, work demonstrations, customer feedback, manager & 360 feedback, updates to the project plan and many other options, your team should use the ones that make sense to you.



TOOL for ENGAGING ONE-ON-ONES

Sitting down to have a significant conversation is the most basic leadership tool to engage team members and resolve conflicts. Schedule these one-on-ones to avoid interrupting team member's work and make them regular to build trust.

Claire Lew's Medium article "[How to have an honest one-on-one with an employee](#)" offers a practical guide to a good one-on-one.



TOOL for ENGAGING TASK RELEVANT MATURITY

Task relevant maturity (or TRM) is the degree of experience a team member has with a certain task. **Having a project leader that respects this helps a lot with the team's productivity and morale.**

Clear “what, when and how” instructions and regular check-ins to offer help are effective when a team member has low TRM.

Thoughtful two-way conversations are needed when a team member has medium TRM.

Establishing an objective and monitoring it from far away is the way to go when a team member has high TRM.



TOOL for ENGAGING

CELEBRATE EVERY WIN

Small celebrations for small wins.

Big celebrations for big wins.

Team celebrations for individual wins.

Company celebrations for team wins.

A song, some GIFs, some cake, the replacement of an unnecessary meeting with a well-written e-mail, a high-five, an indicator going from red to green, a reward... There are a lot of ways to celebrate.



TOOL for ENGAGING TRIBAL LANGUAGE

You can tell when you run into a tribe. It's a group of people that was brought together by a goal or interest. They fight for each other. They have their own culture and their own "secret" language.

So make your team feel like they're in a tribe. Pick up names and rituals that team members invent and make these things part of your collective identity as a team.



TOOL for CLIENT RELATIONS

CUSTOMER SERVICE

BASICS

Keeping a client satisfied during the entire project is often impossible, but **small efforts like the ones below can help a lot with maintaining good relationships:**

1. Build trust by always answering personally and quickly. It's better to give an incomplete answer now and an update later than to wait for information or have someone else answer for you;
2. Communicate in a way that best suits their style (face-to-face, messaging, phone calls, e-mail, etc.);
3. Give frequent updates tailored to their interests;



MINDSET for PLANNING

THROW LESS AT THE PROBLEM

There's a law that states that work expands so as to fill the time available for its completion.

Throw a bunch of resources at your project, and it will eat them all up.

Plan your whole project as if you had half the time (or half of another resource) available. What work is truly necessary? Do just that.



BETTER
HOMES
CLOTHES

REINHOLD WILHELM & CO.
NEW YORK
PRINTERS

MINDSET for PLANNING

FOCUS ON DELIVERABLES

It makes no sense to work on something that won't have any use. Use some or all of the rules below to avoid this.

1. The first step of planning a project should be determining what will be ultimately delivered;
2. Team members should be assigned deliverables (documentation, reports, models, calculations, designs, etc.), not actions (study, research, implement, create, etc.);
3. Differentiate deliverables that will be received by your client from deliverables that won't. Remove deliverables of the second kind that aren't really needed.



Should
Have

Could
Have

Want to
Have

Frictionless
Not enough room
to live

Better test
(Automate)

Check
point (API)

Export
PDF

Edit
Profile

Profile
API

Profile
Search

Print

Easy
Imports

Fix
Feature

Provide
Public API

System of记录

Complete Product

Designs
>
Features

Features
>
Designs

MINDSET for PLANNING

USE PEOPLE'S STRENGTHS

Better than correcting people's weaknesses, is letting them improve their strengths.

Using each team member's strength is also good for the project, that gets done quicker and better. **So let people work with what they're good at.** Include people in the planning process so they can indicate the work that they're good at.



MINDSET for EXECUTING PICK A GOOD LEADER AND WORK IN CYCLES

Requirements changing frequently? End goal isn't clear? Don't know yet which solution to use? **In these uncertain circumstances, work in short cycles to ensure you are always moving forward.** Have a good leader to help the team move fast.

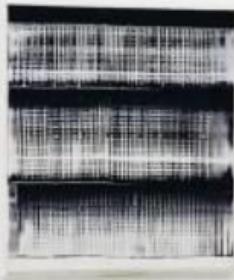
Inspired by this [Wrike article on eXtreme Project Management](#).

HOW TO ADOPT:

1. Make a project plan. Expect change and errors;
2. Schedule work in short cycles (a few weeks max!) Start cycles defining what everyone will work on. End with review sessions;
3. Have the leader focus on engaging people, answering questions, communicating very frequently, listening to the customer & celebrating wins (i.e. the human side of project management).
Avoid micromanaging and using too many tools/formalities

TIPS:

- Don't 'wing' it: As a leader, only make your team start working after you have a good vision and understanding.



MINDSET for EXECUTING MINIMUM VIABLE DELIVERABLE

If we don't police ourselves, we end up stuffing the documents, models or code we deliver with things they don't need, and forget to make the parts that do matter as good as they have to be.

So ask yourself as soon as you get a new task:
“If I had to deliver this in half the time, what couldn't be missing?”

Do that, and then use the rest of the time to improve it.



MINDSET for EXECUTING DECISIONS ARE PROGRESS

Whenever you need to make a decision, make it quickly and based on what you currently know. You can always go back and change things later. After all, decisions don't have to be permanent.

This mindset favors maintaining team morale and project progress over making perfect choices.

Inspired by Jason Fried's "Rework".

HOW THIS MINDSET LOOKS IN ACTION:

- An engineer or designer needs specifications to start working on some models. Instead of waiting, they use estimates and fix everything later when the actual specifications arrive;
- Your team doesn't know how to move forward. Team members share their gut feelings, commit to a **guess** of what is the best option and start working. You might have to go back to fix things later but the work that will have been delivered will still be useful;
- Your team favors asking for forgiveness for breaking something over asking for permission to move forward with their work.



MINDSET for EXECUTING EDITOR/OPERATOR

Complex project and large team? Consider having two leaders playing the following roles:

Editor – Makes sure the team is on the right path. Works on few projects. Cares about details. Keeps an eye on future problems. Guides team members that are having a harder time.

Operator – Makes sure the team is moving fast. Makes lots of stuff happen. Cares about solving current problems. Guides most team members.

Requires discipline from both leaders to talk regularly and keep up with each other. Inspired by this [Buffer Article](#).



MINDSET for MONITORING

TELL YOUR BABY IT'S UGLY

We have a natural tendency to fall in love with our own work, but we shouldn't. In reality, we need to think that our work is ugly so that we can find its flaws. We need to find what parts of it are assumptions so that we can tear them apart ourselves. We need to break out own hypothesis.

Get used to telling your work that it is ugly, so that you don't have to hear it from your client.



MINDSET for MONITORING OPENNESS AND RESPECT

Openness is about sharing openly whenever we fail or we don't know how to move forward. It's about sharing this with confidence that team members will neither ignore nor overreact to these news. It's also about being willing to change.

Respect is about understanding that, given what they knew and what they had, everyone did their best job.

Together, these values allow team members to proactively monitor each other without creating conflicts.

Based on Scrum's Values and on the Retrospective Prime Directive.
Heavy commitment from team members is necessary.