Effective Project Management

Key Steps for Project Success

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The project management profession is growing rapidly. There are different project management methodologies available in the world. Different companies follow different methodologies. However, in all these methodologies, some common steps are followed such as project planning, project execution, progress tracking, status reporting and closing project, etc. This article explains these common project management steps followed by the majority of the organizations.

Thousands of projects are going on worldwide. All may not be following the same process or project management methodology. However, what are the common steps followed in handling a project to make it a success? What steps are involved in managing a project when we professionally manage it? What are the functions or activities that the project manager focuses on?

Project Charter

The first and foremost thing in implementing a project is to develop the project charter. It is the justification for the business requirement or the business need. The project manager, in consultation with the sponsor, will develop the project charter. It spells out the need for the project and briefly desribes the project, mentioning, who is the project manager and who are the stakeholders. The project charter helps in proceeding further in project development.

Identification of Stakeholders

While developing the project charter, the project manager should identify the stakeholders of the project. This is a very important step in project management. Actually, stakeholder identification is a continuous process. At any stage of the project, stakeholders can be identified. Hence, it is the best practice to workout the stakeholders' list and document it in the initial stages of the project. During the course of the project, this stakeholder list can be updated. The project manager should be aware of the needs and wants of the stakeholders as different stakeholders will have different wants and needs. This makes the job of project manager easy and reduces the future conflicts in the project.

Project Planning

Once the project charter is approved by the customer or senior management, the project manager can go ahead with the project planning. For this, the project manager can use

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Work Breakdown Structures (WBSs) as tool. Once the work packages, control accounts and planning packages are identified from the WBS, the project manager can go ahead with project scheduling. Before this, the project manager has to identify the resources needed for the project—both human and machines. During the project planning stage, for scheduling purposes, tools such as Microsoft Project or Primavera can be used. During this stage, one can identify the critical path in the network diagram during schedule development. One can also identify the risks involved using the critical path in the network.

During schedule development, the project manager can use different schedule compression techniques such as crashing and fast-tracking.

Communicating the Project Plan

Once the project plan is made, it is the job of the project manager to communicate it to all the stakeholders. In the early stages of the project, the project manager has already identified the stakeholders. However, not all stakeholders are interested in all the information of the project. The project manager has to maintain the details of needs and information in the communications management plan. Based on the communications management plan, the project manager needs to distribute the information to the stakeholders. This avoids any confusion in future. Everybody will come to know the goals and objectives of the project.

Objectives' Setting

Usually at the beginning of the project, the objectives are set for the project from the organization point of view. At the same time, the objectives are to be set at the individual level as well. Some of the companies such as Tata Consultancy Services follow this using Balanced Score Cards (BSC) for setting objectives to the team members by drilling down the objectives from organization, department and project levels. These objectives-setting process is very important because the team members come to know about what is expected of them. Usually, the objectives will be set in technical areas as well as managerial areas (if any) for the team members.

Project Execution

The project manager should get the approval for the project plan. It may be in the form of sign-off from the customer, if the customer decides the project deadlines. Otherwise, if it is an internal project, the project manager should get the approval from the senior management for the project plan. Once the project plan is approved, the project manager should go for project execution. By this time some of the resources may have been already allocated for the project. Using the allocated resources the project manager should execute the project.

The project manager spend most of the time in execution of the projects with the help of the team.

Tracking Progress

In the execution stage of the project, the progress needs to be tracked. The project manager, using different tools and techniques such as earned values, decision trees and statistical control techniques, should track the project progress. He has to update the senior management whether the project is on time, underbudget or if any deviations are there from the planned details. Cost variance and schedule variance need to be updated in the project plan.

Also tracking the progress, the project manager conducts Project Status Review (PSR) meetings periodically, usually once a week.

Evaluating Team Member Performance

At the end of the project or at the end of appraisal period, the performance of the team members is to be evaluated. The objective of performance appraisals is to identify the training needs of the team members and to take necessary actions. The effect of performance appraisal will be there on human resource activities such as promotions, transfers, demotions and exits. In all these cases, Human Resources Department (HRD) needs to take necessary actions.

> A good project manager gives feedback to the team members at regular intervals and observes their progress

In IT organizations, usually the rating scale method is used for programmer's performance appraisals. If the number of employees is very less, then we can even go for ranking method of performance appraisals. The project manager may not wait for the performance appraisal time to come to give feedback to the team member. A good project managers gives feedback to the team members at regular intervals and observes their progress. He helps in the development of his team members. If the needed progress is not observed in a team member, then the project manager needs to take necessary action against him/her. This comes under the controlling function of the manager.

Progress Reporting

The project manager has to update the senior management and other stakeholders with the status of the project. The frequency of this status reporting to the senior management varies from organization to organization. Some organizations conduct these Senior Management Review (SMR) meetings once a month. Also the project needs to undergo periodic quality audits from the quality department. The project manager is responsible for closing the Non-Conformances (NC) given by the Quality Assurance (QA) team. Usually, the QA team tracks these open NCs of all the projects in the organization. This happens because the QA team is responsible for internal and external audits of the organization.

Handling Crisis

While executing the project, the project manager may face some risks or unexpected circumstances. Hence, it is better to include risk planning as part of project planning, i.e., identification of risks, qualitative and quantitative risk analysis and risk response planning and risk monitoring and control are the steps involved in the risk management. Hence,

with proper risk management, the project manager will be in a position to execute the project smoothly. Also, if something goes wrong, the project manager should be able to rescue the project.

Training and Development

Based on the performance appraisals, the training and development needs of the team members will be identified and planned. The training needs depend upon the efficiency of the individuals. The project manager is required to update the training plan based on these training needs. The HR department will plan the training schedule after it receives inputs from all the project managers. It is better for the individuals to attend the scheduled training programs for self-development. Usually, there are different types of trainings provided to the team members. Some of them are induction, on-the-job training, coaching and hands-on training. The internal or external faculty can provide the training programs. The training needs for engineers and managers vary. Based on the experience level of the team member and the project need, the project manager should nominate a candidate for suitable training programs.

Releasing the Deliverables

Once the deliverables are ready, that is, after all internal and external (if any) reviews, the project manager has to give them to the customer. The customer, in turn, does acceptance testing of the deliverables. This is the scenario in any turnkey solution or a

> **The project manager is required to update the training plan based on the training needs**

typical project environment. If the project deliverable is a product, then the project manager has to release the deliverable and any documentation to the customer support team. Once the product is released from the engineering team, it is the responsibility of the team to provide the required support. While handing over the product to the support team, the engineering team should do the knowledge transfer to the support team.

Project Closing

Once the product is handed over to the customer support or technical support team, the project manager has the responsibility of closing the project officially. He has to do the post-mortem of the project. The project manager has to document the lessons learned during the course of the project. He has to release all the human resources of the project. The project manager has to officially communicate about the closure of the project to the stakeholders.

Conclusion

The points mentioned in this article may seem very obvious, however these are the key steps followed in any project using any project management methodology. Hence, the project manager should follow the proper steps in initiating, planning, executing, monitoring and controlling and closing the project. These steps help the project manager in successfully completing the project.❖