# Project Management Best Practices

This document is intended to provide an overview of phases in project lifecycles. It includes brief descriptions of phases as well as potential questions to consider at each phase. It does not adhere to a single project management methodology but draws from multiple. More specific documentation that elaborates on project management processes and templates will be linked here as created.



## Before you begin

Before you formally initiate a project, ensure that a project is necessary. A project has a clear beginning and end as well as clear objectives. A project will solve a problem by providing new or improved products, services, or processes.

**Questions to ask:**

- What is the problem you are trying to solve?
- Is this something that has a clear end?
- Do your colleagues and management agree that your problem is “a problem”?
- Would a SWOT analysis be helpful in defining your project?
- Has someone else already solved this problem somewhere else? Can you borrow from their work?
- Has someone else already attempted to solve the problem at your institution? What was the result and why was it successful / not successful?

## Starting a project

Once you have determined that this problem is best solved by a project, begin the project planning and pre-work. This is a time to develop documentation that will guide the project - those who work on it, the tasks it undertakes, and the output it produces. While everyone may be excited to begin working on the project immediately, spending time to develop documentation generally will reduce unnecessary work or rework and keep everyone on track in the longer term. Some projects may lend themselves to a lightweight approach and won’t require all the documents described here, but it’s useful to be familiar with the full breadth of available tools.

Pre-project work is the phase in which a problem is identified, defined, and information about the problem is gathered. This information can include details about the current state of practice at your institution as well as information from an environmental study. Pre-project work also includes the identification of stakeholders such as: end-users/customers, managers, project managers, those doing the work, those funding the work as applicable, and any generally interested parties.

**Questions to ask:**

- What resources do you need? (people, money, material, time)
- Who are the right people to solve your problem?
- Do you require a domain or subject matter expert to understand the problem and solve it?
- What is the priority of this project in relation to other projects and ongoing work?
- Who needs to “buy-in” or approve before you can begin?
- Who are the anticipated users of the product or service?
- Who and what will be impacted by the new product or service?
- Will any users of the service or product need training before the product or service launches?
- Think about: owners of and a plan for ongoing commitment.

## Project documentation

The documentation developed while starting a project can include a project charter (see: TRLN Project Charter Template) or project plan, a communication plan, schedule, budget, supporting information in a project management tool, and any other supplemental information. These documents will provide in-depth information about people (see: TRLN Project Roles Definitions and Template): project team members and their roles, stakeholders and their needs, and communication expectations. The documents will also define the project’s end result: goals, functional requirements, deliverables, and what is in or out of scope. Finally, the documents will address the things that impact projects: budgets, timelines, risks, and change processes.

Hold a kickoff meeting either prior to creating documentation or once documentation has been finalized. Regardless of timing of the kickoff meeting, ensure that all key individuals sign off on the project charter/plan so that everyone involved can proceed to the goals with the same expectations for success. Use the project charter/plan to get buy-in from stakeholders (both those who control resources for your project and those who will be impacted by your project).

**Questions to ask:**

- What is the project’s goal and scope? What is (are) the associated deliverable(s)?
- Who is involved in or impacted by the project?
- What are the project limitations and constraints (time, budget, challenges)?

# Projects in progress

Now that the project is underway, your well-articulated plan, timeline, and stakeholder identification will help you to keep the project on track. However, even with excellent planning and the best intentions, projects will inevitably get messy.

As the project manager, ensure that you perform regular, scheduled assessments with your team and check-in with the stakeholders. Communication is essential throughout a project's lifecycle! It is often beneficial to use prototyping, mockups, and beta testing to gather feedback at multiple points in the process, which also helps your team to embrace risk taking, failure, and iteration.

In all of your communications with the team, be honest about the project's progress, challenges (aka roadblocks), and remaining work. It is hard to be honest, especially if the project has encountered problems. Don't be afraid; be clear about issues. Your team and your stakeholders respect honesty. You can do it! Enlist the help and support of management when needed if your team members are not delivering as promised. Conversely, don't hesitate to celebrate victories, however small, and acknowledge progress.

Be open to change - in goals, scope, schedule, budget, and stakeholders - but do not let it manage the project. If a change occurs that impacts the project, make sure to update the documentation so that you have a record moving forward. Don't be tempted to over deliver or to dive down every rabbit hole or tangent. Remember that you can always create new, related, or follow up projects for things that are worthwhile; but if you continually move the goals for your current project, you prevent progress.

**Questions to ask:**

- Re-read your project charter - does it resonate with the work you and the team are actually doing? Or are you now doing a completely different project?
- Are you following through with your communication plan?
- Is the project still in scope? Is the scope creeping?
- Is the timeline still achievable? Why or why not?
- Where are the roadblocks? Who can address these issues?
- Have you learned anything that indicates a need for changes to your project?
- Are you over-delivering?
- Are you assessing & measuring the right things to ensure success?

# Ending a project

Once the new or redefined product, service, or process has been delivered *and accepted*, the project is complete. Any ongoing or maintenance work should be considered regular work, not part of the project. In addition to getting formal approval that the work is complete, the end of the project is also the time to assess the project as a whole (see: TRLN Gathering Feedback matrix) to better inform future projects, finalize and archive project documentation and lessons learned, and celebrate success. If the team is tracking their time, the end of a project presents an excellent opportunity for consolidating this data. Although it can be challenging for teams to embrace time tracking, it is the best method for predicting the resources required for similar projects in the future.

Although not essential, it is beneficial to document the end of project assessment as a report and archive it with other project documentation. It is not overly time-consuming to produce an end of project report, and as it is sometimes required for grants it is a good habit to form. Regardless of how the end of project assessment is conducted, it is important to recognize team members' contributions and show appreciation for their efforts. It is also beneficial to officially inform all project team members that the project is over, their work is complete, and they are free to focus on other tasks and projects.

**Questions to ask:**

- Did you meet the project's goals?
- Did you receive sign-off on the deliverable?
- Have you transitioned any service/support work to those responsible for it?
- What lessons did you learn? How can you use them and your project's information to improve a future project?
- Did you thank your team and your stakeholders? Is there an opportunity to thank your team publicly or announce your results widely?