4. Project Management Toolkit: Work the Project

You have initiated the project and planned as much as you can (or need to), and now it is time to "work" the project. Commonly referred to as the "execution" phase, this is when you and the team start to execute tasks to bring the project vision into reality.

During this phase, a lot of the project manager's heavy lifting is usually done – it is up to the members of the team to complete tasks. (Unless you wear multiple hats and are also responsible for executing tasks defined in the project plan.)

This does not mean that a project manager can just sit back and relax during this phase. While a project manager may be playing a less central role in driving the project forward during the execution phase than during the initiation and planning phases, a project manager's responsibility to assign tasks, manage processes, and facilitate communication during this phase is critical to meeting the project goals and ensuring that the project stays on track.

Main Responsibilities during Execution Phase

A project manager has three main responsibilities during the execution phase: managing people, managing processes, and managing communication.

<u>Managing People:</u> During this phase, the team members need to know what each member is doing, and will need to have all the information and resources necessary to complete their tasks. A project manager needs to make sure that each team member has enough clarity about what they are doing and by when it needs to be done. If things need to be defined more clearly, or a team member is missing key information or needs additional resources, it is the project manager's responsibility to remove those barriers to progress on a task. And in the event that a team member is not suited to perform the task assigned, the Project Manager needs to change course and find a different way to get the work done.

Managing Processes: The project manager is responsible for defining and overseeing the processes by which the team will execute project activities. This includes setting up systems and structures for managing project documents, tracking project activities and tasks, and communications tools. An organization or team that has worked on many projects together may have established processes and systems that have worked in the past, but it is also important for a project manager to be prepared to adapt and modify project management processes, if necessary, for example, if the team composition requires a different approach, or because the project scale or complexity demands it.

Managing Communications: A project manager serves as the lynchpin for effective communication across the project team and with stakeholders. During the execution phase of a project, the Project Manager should be following the Communications Plan created during the planning phase, and ensuring that the right information is flowing freely. Any breakdowns in communication must be addressed quickly to avoid the possibility of unidentified risks or issues growing into larger problems.

Key Questions

- Who should be assigned to project activities? Are there any roles or skills missing in the team?
- Have we clearly identified the activities so that they are actionable?
- How will we work together as a team to understand what needs to be done, and by when?
- Is the team communicating well? Are the stakeholders getting the information they need?

Key Activities

- Set up a project management system (such as a spreadsheet, shared Word document, or project management software) and define how the system will be used by the team.
- Assign project activities and tasks with clear completion criteria and deadlines.
- Establish clear communication channels, norms and practices with the team and stakeholders.
- Review progress of project activities and monitor project communications. Determine whether processes are working and adjust if necessary.

Who is Doing What Work?

Task Management vs. Project Management

During the “execute” phase, the project team begins to drill down into task management and complete the actual work on deliverables.

For team members, task management during execution is about determining what needs to be done to bring a specific task to completion, and then performing those steps and reporting back to the project manager and the rest of the team when the task is complete. Assigned team members need to “own” the mini lifecycle of each task they are assigned, and need to exercise their own judgment about how to prioritize their time between different tasks, between tasks related to this project, as well as balancing the priorities measured against other work they are responsible for.

A project manager may be responsible for specific project tasks during the execution phase, but their essential role during the execution phase is to monitor the progress (or lack thereof) on the tasks that have been assigned to project team members and ensure that tasks are being completed in the most logical sequence and with a focus on the right priorities.

Defining and Assigning Tasks

Ideally, the work of defining tasks will have been completed during the planning phase of a project, but project managers should expect to continue defining tasks during the execution phase as well. It is unrealistic to expect that tasks will have been completely and thoroughly anticipated during project planning, and often the best a project manager can hope for is to define project tasks more broadly during planning with the intention of drilling down into specifics during execution as more information is needed or becomes available. For example, during planning for a project that involves data migration, a project plan might simply have the task “Prepare data for migration” in the activity list, because spelling out all the steps involved in preparing the data may result in an activity list that is bogged down with too many granular items. Project Managers can use a defining and assigning tasks chart as a way to define tasks and note who is assigned to each task. See below.

Legal Services National Technology Assistance Project

Texting Legal Self-Help Project

JUST TECH

Mapping User Journeys *Child Custody Texting Flows*	**Project Manager**	**Vendor Lead**	**Family Unit Managing Attorney**	**Family Unit Intake Staff Member**
Build branch logic for different legal help needs	Accountable	Informed	Responsible	Consulted
Prepare script for each question and response	Accountable	Informed	Responsible	Consulted
Identify resources to provide user at endpoints	Accountable	Informed	Consulted	Responsible

As a project manager, you should not expect that you will always be able to define and estimate effort on tasks with a high degree of accuracy or thoroughness during the planning phase of a project, and you should always expect to do some of this during execution. The ability to define and estimate the effort on project activities thoroughly and accurately depends a lot on how much experience you have managing a particular type of projects, whether the project involves learning about new software, processes, or systems, and whether the project stakeholders have clearly defined what it is that they are expecting. Without a clear understanding of what you are building towards and how you are going to get there, it is inevitable that you will be spending time defining tasks as you go during the execution phase.

The Activities List and Task Tracker

An activity list and task tracker are essential components to effectively executing a project plan. A project activity list is a breakdown of the deliverables in the project into manageable chunks of work that can be assigned to team members. A project task tracker tracks the various ad hoc tasks that often emerge while executing a project that may not belong on the activity list. Together, they should represent the total amount of work needed to complete a project from beginning to end.

What is the difference between the two? Generally, scope and purpose.

Remember, an Activity List should be created during the planning phase, and it is your best effort to break down project deliverables into manageable chunks of work. Activities on the activity list should not be unmanageably large. For example, if your project is “Implement Learning Management System” the activity “Create Content” may be too large and vague to manage properly and may need to be broken down further into smaller chunks like “Create Microsoft Word Training Content” and “Create Case Management System Training Content.” On the other hand, activities on the activity list should not be so granular that you overwhelm yourself and the team with details. Taking our Learning Management System example, you would not want to define a very granular task like “Email Sally at Learning Management Corp to schedule a product demo.”

A good rule of thumb for knowing how much it takes to break down project deliverables into an activity list is to keep them to between 8 and 80 hours of work. Any more than that, and you will have trouble keeping track of the task because it is a major sub-project. Any less than that, and you will be at risk of getting lost in the weeds as you try to micro-manage sub-tasks.

A task tracker, on the other hand, is exactly the kind of document or tool you would want to use to track granular tasks, such as sending out coordinating emails, or uploading the organization’s logo into your shiny new intranet’s header. Often during a project, small tasks come up during meetings or while conducting other project work that are not large enough to be added to the Activity List. That is where keeping a Task Tracker for your project comes in. It can be a simple Excel list with a Subject, Date, and Assigned To field. Or you can use tools such as Microsoft Planner, Trello, or any number of other project management tools. The important thing is to capture these tasks somewhere, or else risk losing track of them. Even a small task may be critically important if it is part of a larger project activity or there are dependencies connected to completing it. Watch this video to learn more about tracking tasks.

What Project Management Tool is Right for You?

The right project management tool for you and your team depends on several factors. Do you already have an approach that you have used with this team or another team that has worked? Is the project extremely complex, with lots of dependencies and multiple components that can be worked on in parallel? How much change can the team (as a whole or individually) tolerate? How much time do you, as a project manager, have set up a new project management system, and train the team on how to use it?

Using What You Have

It may make the most sense to start by using the tools and systems you already have on hand to manage the project activities. One of the most common pieces of software used to manage projects of all types is a basic spreadsheet like Microsoft Excel or Google Sheets, because it is infinitely flexible while still providing the ability to structure information in ways that allow for easy scanning and analysis. And you are much more likely to find that more members of your team will already be familiar enough with a spreadsheet to be able to read it and understand what they are seeing.

If your project team is comfortable with your case management system, and you already have a requirement that all time on projects be tracked there, it may make sense to manage your project activities there.

You can even just use a Microsoft Word or Google Doc document to manage project tasks and activities – as long you structure it in a way that allows all team members to understand the project activities, what is assigned to them, and when it is expected by.

The point is, there is not ever an absolute need to adopt new project management software in order to successfully complete a project. Complex projects like the Hoover Dam were completed not because of slick and complicated software – they were completed because the skilled project managers in charge of overseeing the project employed effective project management techniques. (And they invented groundbreaking new techniques like the Gantt Chart.)

A Simple but Deceptively Powerful Approach: Kanban

You might think that using a word processor or spreadsheet is about as simple as it can get in terms of project management approaches, but many have found that using sticky notes on a wall can be one of the most effective ways to manage a project.

Commonly referred to as the “Kanban” method, the most basic form of this approach is to divide your board or wall into three columns labeled “To Do,” “Doing” and “Done,” and use sticky notes to represent activities or tasks. Start with all of them in the “To Do” column, in order of priority from top to bottom, and as an activity or task is assigned from the top of the column, put it in the “Doing” column and write the name of the person assigned on the note. When it is done, move the activity or task to “Done”. Rinse and repeat. Throughout the life of the project, you may find yourself adding new activities and tasks and reordering them as priorities shift.

One benefit of this approach is that it is immediately intuitive. A Kanban board provides a visual representation of the tasks that need to be completed, the amount of work in progress (in the “Doing” column), and the completed tasks. It is also easy to recognize a throughput problem if there is too much work-in-progress for too few people (most Kanban adherents suggest that each person should only have one item in the “Doing” column at any one time).

The Kanban approach may not be for everyone, and it may not be the most effective approach to managing projects that have strict deadlines and budgets or those that have complex dependencies. It is often used in managing projects or work cycles where priorities change frequently or if there is a need for flexibility in the order that work is done.

And while it may seem simplistic, the Kanban approach is still used today to build complex software or to manage manufacturing production cycles.

To assist you in developing your own Kanban board, use this guide: Kanban Board Guide

The Case for Adopting New Project Management Software

Sometimes, rolling out a new project management system may make sense if you find that a more basic or analog approach just is not working. You might find that you are tasked with managing multiple similar projects that require you to report progress and metrics across all those projects. Or it may be that your project team is completely remote and distributed, so using sticky notes on a wall, or relying heavily on in-person meetings to coordinate effort, is just not feasible.

There are too many project management systems to list here, and new ones are released on a regular basis. Some project management software has an emphasis on allowing program or portfolio managers to have greater insight into the overall status of all active projects. Other project management tools emphasize ease of use and simplified user interfaces to make adoption easier. Some are more ideally suited to particular industries, like software development or media companies. Here is a quick rundown of some popular ones:

- Microsoft Project
- Microsoft Planner
- Monday.com
- Asana
- JIRA
- Trello

You might even find that no project management system out there really meets all your needs, but you need something more powerful than a spreadsheet. In that case, you can consider building your own project management system using platforms like SharePoint, Salesforce, or AirTable. Setting up project management in these types of platforms is a project unto itself and will require staff and time.

Keeping an Eye on Task Progress

One of the main responsibilities of a project manager during the "Execute" phase is monitoring task progress. We cover this in greater detail in the "Track and Re-Plan" section of this toolkit, but it is worth mentioning here in the context of discussing specific activity and task-tracking tools, because how you prefer to get task updates and progress may influence the choice of which project management approach or tool you use.

It is useful to think of these project management tools or systems in two distinct categories: Tools that make it easy to capture information (i.e., word processing documents, spreadsheets, sticky notes on a wall, etc.), and tools that are highly structured and make it easy to analyze and digest information.

If you find that updates on project activity happens best through regular meetings of the team members, or if you find that there is not much appetite or capacity in the team to set up, learn, and use new software, then project management tools or documents that are flexible and make it easy to add information may make more sense.

If your project is one where team members are clear about what they need to do and how to do it and you do not need frequent “sync-up” project meetings, or if you need a system that delegates responsibility to the team members to provide task updates in a structured manner for easy review and reporting, project management software such as Asana, Monday, or Jira may be the best way to manage your project and track the progress of activities.

Be aware, though, that often there is an inverse relationship between how easy it is for team members to provide information and how easy it is for the project manager to understand key information about task progress overall. For example, the easiest way for a team member to provide an update on the progress or status of a task is a one-on-one conversation. But that requires a lot of effort on the project manager’s part to have conversations with individual team members, and if the project manager needs an overall picture of project health, some effort will be needed to document or synthesize the updates in some sort of system or document to provide a comprehensive view. On the other hand, a system like Asana or Jira may allow for the creation powerful reports and dashboards to instantly provide an overview of a project’s status on-demand, but there may be a lot of effort expended to train the team on the system, and you may encounter challenges getting the team to use an unfamiliar tool to track information.

Supporting Team Members

One of the project manager’s most important roles is to support the project team members to accomplish their assigned activities. If a team member is struggling to complete an activity or task, a project manager needs to identify the reason quickly and take action to address the challenge. If there are external factors, such as a key stakeholder not providing the necessary data or information that team members need to complete their task, then it is exactly the project manager’s job to assist in getting that information or help identify an alternative way of completing the task. If the team member is unclear about the completion criteria for the activity or does not fully understand the task they have been assigned, then it is the project manager’s job to provide the completion criteria or additional clarity needed.

In situations where a team member just is not the right person to be handling a specific task, it is often helpful to reassign the task and find a task more suitable for that team member.

Are Our Processes Working?

Tinkering with processes during project execution may feel like an ineffective use of your time as a project manager. If you planned effectively, got the right people assigned to the project, and everyone is clear about what they need to be doing, then why would you need to change your processes when the execution phase is about executing?

If your processes are working, then obviously there is no need to make changes. But as a project manager, it is important during the execution phase to take a step back and see if there are ways that your processes (or lack thereof) are a barrier to effectively executing activities and tasks.

If your team is struggling with the steep learning curve for a project management system you have set up and you are finding that you are not getting the input or updates that you need, then maybe it’s time to simplify the setup, or switch tactics completely and get project updates in a daily 15-minute stand-up meeting.

If you have established weekly stakeholder update meetings, but you find yourself struggling to create a meaningful agenda with substantive updates that add value from the last time you met, then perhaps it makes sense to propose changing the meetings to every two weeks or once a month.

The point is, the processes you set out at the beginning of a project need to be flexible so you can adapt to the changing and emerging needs of the project, the stakeholders, and the team.

Communication, Communication, Communication

Managing communications is the third key responsibility of a project manager during the execution phase. Communicating with stakeholders and team members throughout the execution phase will ensure that everyone understands the milestones, and risks and issues are mitigated or dealt with. Regular communication also makes it more likely that unspoken assumptions or misunderstandings will be surfaced and addressed before they flare up and become full-fledged issues that can derail your project.

The Project Communication Plan that you created during the planning phase of your project is your guide for how to conduct communications during the execution phase. In the Communication Plan, you should have identified the method and frequency of your communications with project stakeholders, and how you plan to manage team communication. Having a Project Communication Plan in place at the outset of the execution phase will go a long way to managing stakeholder expectations and ensuring that the team knows what to expect as they start executing project activities.

Communicating with Stakeholders

Communicating with stakeholders internally and externally can be done through a variety of ways and in different frequencies. Whether that is through weekly emails, standing meetings, or monthly status updates, the method and frequency must be flexible. As described above, more frequent meetings may work well in the beginning of a project but can be reduced later in the project.

Establishing a medium for communication at the beginning of a project is important. Phone calls, video calls, face-to-face, or emails are all options and can be interchangeable. It is important to choose which is the best medium for both the team and the type of information to be conveyed.

Communicating with the Team

Just like with managing team members and managing your processes, how you communicate with your team depends heavily on the makeup of your team, and the willingness or ability for the team members to adapt to new ways of doing things.

Status Meetings

Internal status meetings are an effective way of fostering communication within the team – particularly if the nature of the project work requires a lot of collaboration and discussion. As with all meetings, preparing an agenda and facilitating the discussion is important to ensure effective use of everyone’s time.

In some project management methodologies, status meetings are part of a daily ritual to foster team cohesion and maximize collaboration. For example, the

Agile/SCRUM methodology has a daily “stand-up” meeting, typically at the start of the day, during which all team members gather to discuss project activities, review progress, and address any barriers to completing tasks. Stand-up meetings are meant to be short - often, teams will stand during the meeting – and are meant to be a tool for surfacing key information for the team and the project manager.

Whether you decide to implement a daily “stand-up” or opt for weekly or ad hoc project meetings, it is important to regularly evaluate whether the status meetings are serving the intended purpose. Project status meetings may make a lot of sense in the early stages of a project or if the project activities require discussion among team members, but at some point, when tasks and activities are clear, other methods of team communication may be more effective and efficient.

Communicating within the context of your project management tools

Communicating within project management tools can sometimes leave out nuances that video calls can clear up. Automated updates within project management tools are a great way to get an overview of the project as a whole and when applicable, statuses and questions can be asked and answered through the software. Utilizing this tool in combination with other modes of communication helps ensure that the team is in sync.

Within MS Planner, for example, status updates can be set for each task assigned. MS Planner allows functionality for traditional and custom status update markers. Conversations within the tasks allow the team to ask and answer questions with the thread on display for recall at a glance. There are automated notifications for the assignee, assigner, project manager, contributors, and even the whole team at large. Utilizing this project management tool with another mode of communication can keep the team on task, coordinated, and in communication.

In a perfect world, it would be great to know the status of a project at any given moment. The reality is that sometimes team members do not update their tasks, they may experience difficulty with a task and are trying to work through it, or the task is taking longer than estimated. Having standing meetings facilitates receiving updates on the status of a project and the outstanding tasks. Watch this video to learn more about communicating status updates.

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Files

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