

# 1. Project Management Toolkit:

## Introduction

### Overview

According to the Project Management Institute (PMI), project Management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements.

Project management is important because it ensures what is being delivered is right, on time, and within budget while also providing leadership and direction to the project. Prioritizing project management methods allows organizations to deliver real value and avoid overspending and mistakes.

There are many project management methodologies. Some methodologies are better for certain industries or a certain size and complexity level. Choosing a methodology is one of the first decisions made by the project manager. Project managers chose a methodology based on their industry and type of project. Common methodologies include:

- Agile
- Lean
- Waterfall
- Scrum
- Kanban

- Six Sigma

The project management project life cycle has five phases: initiate, plan, work, monitor, and close. Each of these phases has key questions and activities that should be completed during the phase. Below you will find a quick overview of each of these phases.

Initiate: This is where it all begins. In this phase, define the situation and figure out how to achieve the project goal.

Plan: After establishing what the project is and what objectives are involved, now it's time to divide and conquer. In this phase, develop project roles, create a schedule, draft a project plan, and hold a kickoff meeting.

Work: With a realistic plan in place, the project work can begin. In this phase, set up a project management system, assign project activities and establish clear communication channels.

Monitor: Now that the project team has their task(s) and knows how to communicate, it's time to monitor the project. In this phase, evaluate how things are going, provide status reports, and document any identified issues and/or risks. If any changes to the scope of the project are implemented, this is the time to document those as well.

Close: Once the work is complete and project goals are met, it's time to close the project. This phase of the project is often overlooked, but it is such a valuable part of the project life cycle. In this phase, make sure the project goals and objectives are fulfilled. It is also the time to celebrate the success of the project and reflect on what was learned from the project.

To help illustrate how the project life cycle works, we will reference a hypothetical legal tech project throughout this toolkit. The purpose of the hypothetical project is to give you a real-life example of how to apply the project management principles set forth in this toolkit.

## **Hypothetical Project**

Imagine you work for a statewide self-help website. You've always wondered what happens after a user visits your site. You and your team have decided to launch a project that will send SMS messages (texts) to visitors after they visit your site to gather information about their outcomes.

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