teamwork.

The Teamwork guide to project management

A complete breakdown of essential project management best practices and methodologies

Section
01

Why is project management important?

Learn the importance of project management and how it helps your team save time and money, improve internal communication, make better business decisions, and much more.

teamwork.

The way we work is changing.

No matter what role or industry you're in, you've probably noticed it too. According to the consultancy firm Bain & Company, by 2027 most work will be project-based.

And as a result, the Project Management Institute reports that the demand for project managers has been growing more rapidly than the demand for skilled workers in other occupations.

This emphasis on the importance of project managers reflects the growing understanding of the impact that good project management can have on a business.

That's because good project management is about more than just tasks and timings and budgets. Don't get us wrong, that stuff is important too — but we believe that it can be so much more.

Companies are starting to realize that good project management is important for stronger results and happier employees. These aren't just coincidences or side effects — they're functions of project management done right.

So why is project management so important? Let's break it down.

The benefits of good project management

The importance of project management in organizations can't be overstated.

When it's done right, it helps every part of the business run more smoothly. It allows your team to focus on the work that matters, free from the distractions caused by tasks going off track or budgets spinning out of control. It empowers them to deliver results that actually impact the business's bottom line. And it enables your employees to see how their work contributes to the company's strategic goals.

Here are just a few of the benefits of good project management:
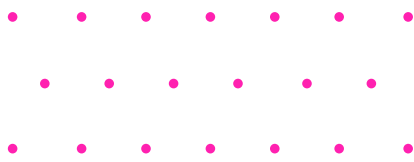
Save time and money

With the right planning, you can ensure that your work is delivered on time and within budget. Using project management methods, you can map your project's journey from the outset and know in advance where the deadlines — and projected spend — are going to fall, so you can more efficiently allocate your resources, helping you to avoid delays and project overspend.

Improve internal communications

Working together can be hard. With more efficient project management processes, you can reduce the complexity of collaboration, increase transparency, and ensure accountability, even when you're working across teams or departments.

Make better business decisions

With clearer records of how your project is progressing, you get a deeper understanding of where your resources are being spent, what you need to prioritize and when, and if you're at risk of going off track. Good project management means that you can forecast issues before they become issues, prevent bottlenecks, and make smarter, data-driven decisions.

Iterate on your successes

Project management helps you to scale high performance and build on your team's best practices. By using the data and learnings from previous projects, you're able to pinpoint where your team is excelling and where there's room for improvement. And by measuring your KPIs you can create and track personalized benchmarks to understand how your team is performing project over project.

Better project planning = better projects

Those are the benefits at an organizational level, and just some of the ways that project management can help to improve your entire business.

But what about your individual projects? Won't it slow things down, add unnecessary bureaucracy, or keep you locked into a plan with no room for innovation?

Don't worry — project management would never do that to you.

In fact, it's the exact opposite. While it can be tempting to just dive into work and hope for the best, it's a false economy.

Without proper project management and planning, you're more likely to end up wasting time in the long run. In fact, one survey found that [80% of people spend at least half their time on rework](). That's a huge amount of valuable hours lost — and it could be avoided with a little extra forethought.

With a solid plan at the outset, you can:

- **Get stakeholder alignment from the beginning,** helping you to get buy-in, minimize bureaucratic pushback, and set the [project's scope](). In fact, spending a little extra time getting this alignment at the start of your project can save you tons of heartbreak down the line, because it removes ambiguity and gives everyone a clear outline of what's expected.

- **Ensure everyone is on the same page** and that they each know exactly what they have to do and when — so no more "but I thought someone else was handling it" mishaps.

- **Flag the risks in advance,** so you know the warning signs to watch out for. These will vary from project to project, but could include things like: one major deadline that will have a knock-on effect on the others if it's missed; a budget overspend that means you have to take money from somewhere else. Once you know what you need to be on the alert for, you're better able to catch when you're going off track and course-correct in the moment, instead of when it's too late.

- **Make sure that each project has a strategic goal.** Bye bye busywork. When you have a solid [project management plan]() in place, you can ensure that each project contributes to your overall strategic goals.

- **Expect the unexpected.** Planning doesn't mean there's no room for change. The best planning has a little wiggle-room built in from the very beginning, so you can adapt and stay. (More on that later.)

But these are just some examples of the [importance of project planning](). When it comes down to it, better project planning can revolutionize the work your team produces — and the results it gets. That means happier stakeholders, more fulfilled teams, and, if you're working in a client-facing industry, more satisfied customers (and more glowing reviews).
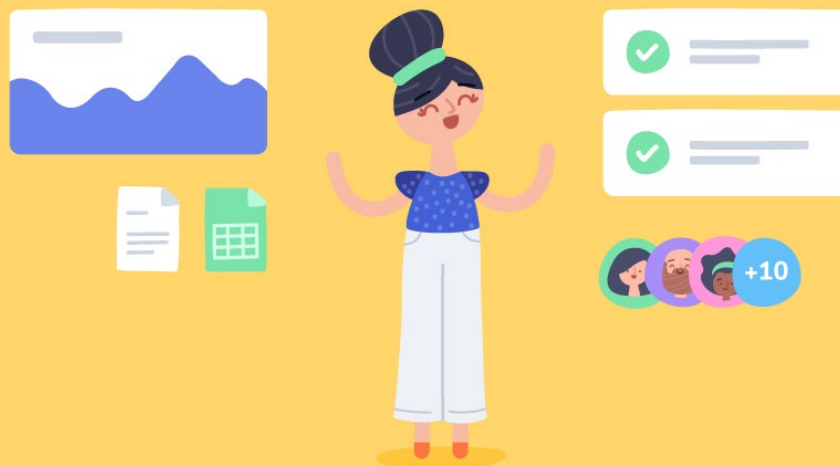
The importance of effective project managers

As more and more of our everyday work becomes project-based, it follows that more and more people are finding themselves in the business of managing projects — even if they're not traditional project managers.

And with the importance of project management only growing, the project manager skillset has never been more crucial.

Project managers are the unsung heroes. They're the people who make sure all your planning actually goes, well, according to plan. They're the ones who can steer things back on track when the unexpected happens. The people who can bring multiple teams, departments and stakeholders together to ensure your project's success.

Nowadays, there are lots of paths to becoming an effective project manager. People can go the traditional route with a project management qualification like PMP or PRINCE2, or they can opt to build their project manager resume by getting hands-on experience managing projects.

Whether you have traditional project managers to fill the PM role or team members who step up for each project, one thing is clear: effective project managers make all the difference.

Project managers often have a reputation as "the people who herd cats". But they're so much more than that (and if they're into a little cat-herding on the side, that's their own business).

Project managers are the people who get buy-in for the project, who communicate the changes, who understand how to get the best work out of everyone, and who steer the project from beginning to end, even when it's being pushed off track. They're the ones who not only plan and organize the work itself, but who can explain the importance of planning for projects, so that everyone on the team knows why what they're doing is important.

The right person takes your project management strategy from good to great. They turn your project's plan into action. And maybe most importantly, they bring everyone along on the journey — together.

Why choose a career in project management?

Now that you understand the importance of project management, as well as some project management functions, you might be wondering: is a career in project management for me?

The growing importance of project management in organizations means that it's a great choice for people who want to take a critical role in helping businesses to achieve their goals and see real returns on their strategy. As a project manager, you can make a real impact on helping organizations to hit their targets and create a working environment where teams can thrive.

Why choose a career in project management? You should consider it if:

You love managing projects. Um, yeah, this one is probably a no-brainer. But if you excel at working with multiple stakeholders across lots of different teams, can allocate deadlines and resources like they're Tetris pieces, and have a real knack for seeing the big picture, it might be time to make it official.

You want to make a real difference to the business. Project managers are on the frontlines of the business, helping to turn intangible things like goals and values into solid results that actually move the needle. Whether you're in construction or software development, project managers have a great opportunity to make their mark on the business and improve how work gets done.

You want to make a real difference to teams. It's not just the bottom line that gets a boost. Project managers are always looking for new technology and processes that can help teams to work together more effectively, efficiently, and productively. And with 63% of workers in the US currently feeling ready to quit their jobs due to stress, creating a smoother, more efficient work environment is a big deal.
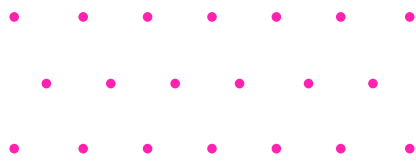
How to define the value of project management

Picture this. You're at a fancy party, and, as per usual, the talk turns to project management. (You know, normal party conversation.)

"Why is project management so important?" someone asks as you make small talk by the canapes.

You're prepared. You've read this article; you know your stuff. You list out some examples of the importance of project management in points, discuss the benefits, and mention the value it brings to organizations.

"That all sounds cool," they might reply, "but how do you prove it?"

Record scratch.

The thing about project management is that when it's done right, it can often feel invisible. And sometimes, defining the value of project management in nuts-and-bolts numbers can be tricky: increased happiness, smoother workflows and improved efficiency are all great, but how do you reflect them in % and $?

But before you lose your cool and flip over a table of vol-au-vents, here are just some of the ways you can define the value of project management and measure its importance for your organization.

Use a project management tool. When your team tracks their work in a project management tool, you have all the data you need to see what's working, where you can improve, and how your projects compare to your benchmarks. Get important stats like the percentage of projects delivered on time, the number of tasks that went overdue, or how much of your team's capacity was spent on each project. Then use those stats to make data-driven decisions and constantly optimize how your projects get done.

Calculate how much time and money project management is saving you. Project management software helps you to better calculate how much time and money each project is actually going to cost you; allows you to cut down the time lost to pointless meetings and communication mishaps; and keeps your employees more engaged and accountable, reducing churn and new hire acquisition costs.

Start quantifying the unquantifiable. Employee happiness? Alignment with company values? They're not exactly classic project management KPIs, but they're equally important functions of project management. So...why not start measuring them like everything else? Use surveys and team feedback to create new benchmarks and track your progress.
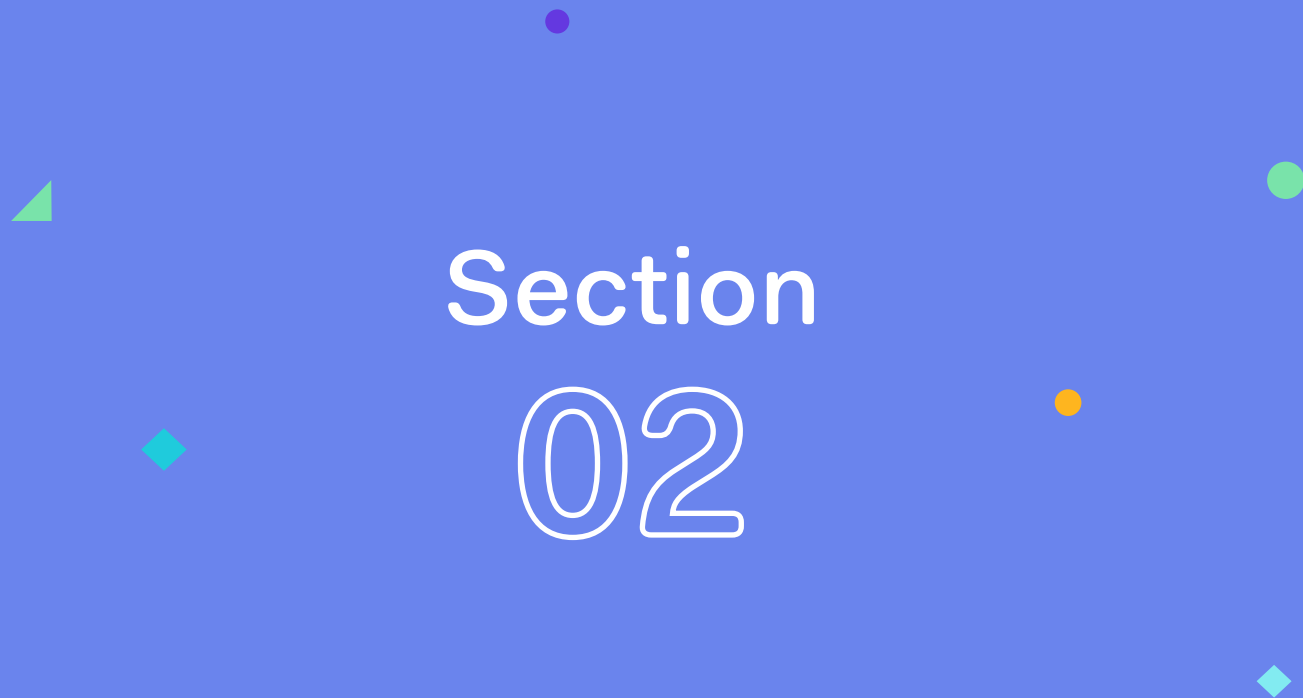
The importance of project management

The importance of project management in construction, the importance of projects in development, the importance of project managers when you're in a client-facing business. let's just cut our losses and say that project management is pretty darn important, no matter what role or industry you're in.

Whether your business relies on traditional project managers (i.e. people with "Project Manager" on their LinkedIn profile or business cards) or skilled team members adopting the important project manager duties and responsibilities, good project management — and effective project managers — can be transformational.

Looking for a TL;DR? Here's a summary of why project management is important in points:

- Saves time and money

- Improves internal communications

- Empowers you to make data-driven business decisions

- Enables you to scale (and repeat) your successes

- Fosters greater alignment across teams, stakeholders, and clients

- Facilitates better risk management

- Helps you to optimize your workflows for smoother processes and happier employees

Section
02

What does a project manager do?

What does being a project manager look like on a day-to-day basis? Learn more about the role of a PM and take a look at some of their daily duties and responsibilities.

teamwork.

If project management is so important (and spoiler alert: it is), it stands to reason that project managers are, too.

We're big believers in the power of a great project manager. But we also know that project managers come in many guises.

They can be traditional project managers: the kind of people who are PMP-trained and PRINCE2-qualified and who have "project manager" in their official title.

Or they can be of the "non-project manager" variety: the people who have found themselves adopting the usual project manager duties and responsibilities as part of their role over time, and are responsible for overseeing and delivering projects in the course of their job.

But whichever type of project manager your company relies on, they're integral to getting meaningful work done. That's because traditional or not, project managers are the people who make sure that your projects are completed on time, on budget, and within scope.

So how do they make that happen? And what does a project manager actually do?
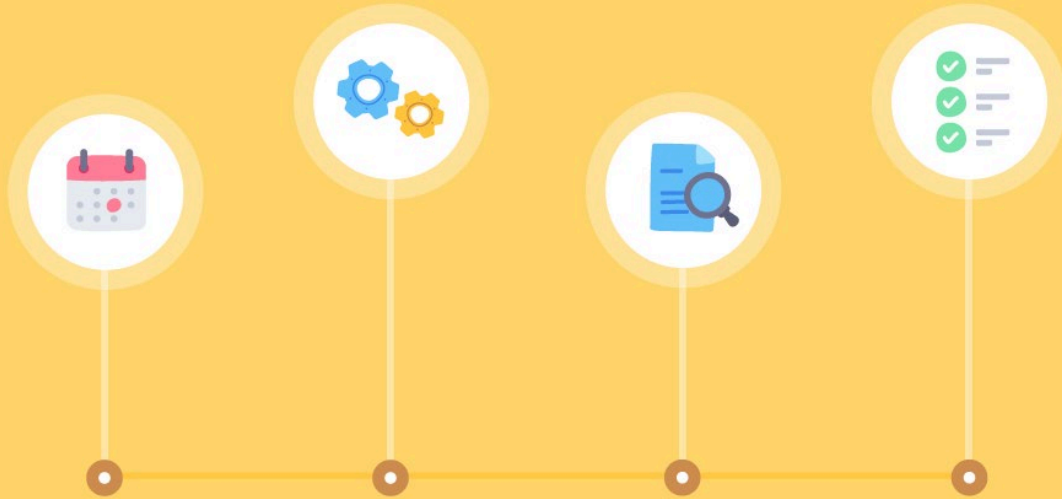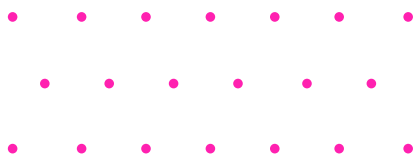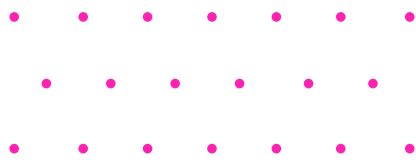
What is a project manager?

A project manager is responsible for the planning, procurement, execution and completion of a project. The project manager is in charge of the entire project and handles everything involved, such as the project scope, managing the project team, as well as the resources assigned to the project.

Ultimately, the Project Manager is responsible for the success or failure of a project. And in truth, it can be hard to define the role of a project manager. The real question isn't "What does a project manager do?" — it's more like "what doesn't a PM do?"

Project managers are involved in so many parts of the project from beginning to end. Their responsibilities include concrete, tangible things like planning and budgeting, as well as less quantifiable (but no less important) things like providing leadership and moral support.

Likewise, as experience and skills become as important to [successful project managers](#) as qualifications, it can be difficult to define who is and isn't a project manager.

Have a project management qualification and some business cards that say "project manager"? You're probably a project manager.

Manage lots of projects on a regular basis, and know-how to skillfully juggle resources to make sure they're completed as efficiently as possible? You're probably also a project manager.

What does a project manager do?

A project manager is someone who is responsible for managing a piece of work from concept to delivery.

It's not limited to qualifications or backgrounds, but instead applies to anyone and everyone who finds themselves managing projects, ensuring they're delivered on time and within budget.

In short: if you do all the things that a project manager does, you're a project manager. Makes sense, right?

That might seem broad, but as we've already mentioned, the project manager job description encompasses a wide range of responsibilities and duties. (More on those shortly.)

What's more, we believe that the more people recognize that they're actually in the business of managing projects (even if they're not "supposed" to be), the more they can adopt project management tactics, techniques and tools, so they can start to manage their projects better.

[(Want to learn how you can put big picture project management into practice for your next project, regardless of your job title or team size? Check out our workbook.)](#)

Project manager duties and responsibilities

Project management plays a central role in lots of different industries. But while the methodologies and output might vary, the project manager role itself stays pretty consistent.

That's because whether you're a construction project manager or a project manager in software development, you ultimately have the same responsibilities: to plan, oversee, and deliver a project.

Regardless of the deliverable of that project — whether it's a new building or a new feature release — you still want that project to be completed successfully and in the most efficient way, from beginning to end.

We've broken down those project manager accountabilities at each stage of the project management process to get a fuller understanding of what project managers do — and why it matters.

Planning the project (in accordance with company goals)

From the outset, the project manager is responsible for defining the scope of the project and aligning with stakeholders to set expectations.

This is the part where the project manager ensures that the project is linked to a bigger strategic goal, defines what "success" will look like, and gets buy-in from all stakeholders.

In addition to all of these strategic elements, it's also where the "nuts and bolts" planning comes into play. The project manager will outline the plan for the project based on the agreed-upon scope and deliverables, including project budget, resource requirements, and timeline.

All of this planning at the beginning of the project is crucial to ensure it runs smoothly — and that everyone on the project knows what "running smoothly" is supposed to look like.

Resourcing the project (and budgeting those resources effectively)

Once the project manager has the plan in place, they need to make provisions for getting it done. For that, you need time, money, and people power. Also known as: resources.

According to PMI's Pulse of the Profession Report (2018), "resource dependency" was listed as a primary cause of project failure in 26% of failed projects, with "limited or taxed resources" (21%) and "inadequate resource forecasting" (18%) following close behind.

So there's a lot riding on resource management. And it's especially tricky because resources are always going to be limited — as a PM, you're never going to have quite as much at your disposal as you would like.

With that in mind, the project manager's responsibility is to allocate the limited resources they do have in the cleverest, most efficient way possible.

Using a project management tool is especially useful for this, because it enables project managers to have full visibility over everyone's workloads, track all of their available resources (and see what's still available to use), and quickly identify where they're at risk of going over capacity to prevent burnout before it happens.

Managing the project (even when things go wrong)

No matter how expertly planned and beautifully managed your project is, life, uh, finds a way.

That is to say: things are probably going to deviate from your lovely project plan at one stage or another.

But great project managers know to expect the unexpected. They've done their due diligence in the form of risk assessment, so they know what to look out for; they're tracking their timelines and resources so they can spot potential bottlenecks before they become issues; and they're level-headed enough to flexibly respond to changes in the moment when and as they need to.

They're the ones who keep the ship sailing in the right direction, even if you have to take an alternative route or patch up a sail to get there.

Motivating the project team (and getting the best out of each person)

When you think of project manager responsibilities, you probably think of the classic three. The ones we've been coming back to again and again: timelines, budgets, and resources.
Those are, of course, super important. But a great project manager isn't just organized and adaptable: they're also emotionally intelligent.

Emotional intelligence is what allows the best PMs to understand what motivates each team member, enables them to navigate conflict, and helps them to keep everyone on the project team feeling happy and valued.

And since happier employees are 13% more productive, it's one of the most important aspects of the project management job description.

Delivering the project (🤞 on time and on budget)

One of the most obvious project manager accountabilities? Actually delivering the project.

It sounds straightforward, but as we've seen above, the successful delivery of the project is dependent on lots of other moving parts working together, beautifully.

So it's the responsibility of the project manager to make sure that all of the above — the planning, the resourcing, the managing, the motivating — actually results in the expected deliverable, at the right time, and within the right budget.

Reporting on the project (and analyzing how to improve for next time)

Good project managers know that the project's not over just because you've Done The Thing.

In order to maximize your chances of success, you need to factor in time for a proper project post-mortem meeting.

By setting aside a dedicated time for the team to review and report on the project while it's still fresh in everyone's minds, you can ensure that all learnings can be documented and used to optimize your processes for next time, so you can continuously improve and scale your project management best practices.

And as any project manager knows, the right project management tool is an invaluable asset for these post-mortem meetings. Since your project management software has been the one central place for all project-related info throughout the project's lifecycle, the project manager can quickly report on the existing data to get the insights they need.

Armed with that knowledge, the PM can see how the project measured up against other previous projects, recognize where the team excelled, and identify where there's still room for improvement going forward — all of which helps them to make data-driven decisions that help propel the business forward.

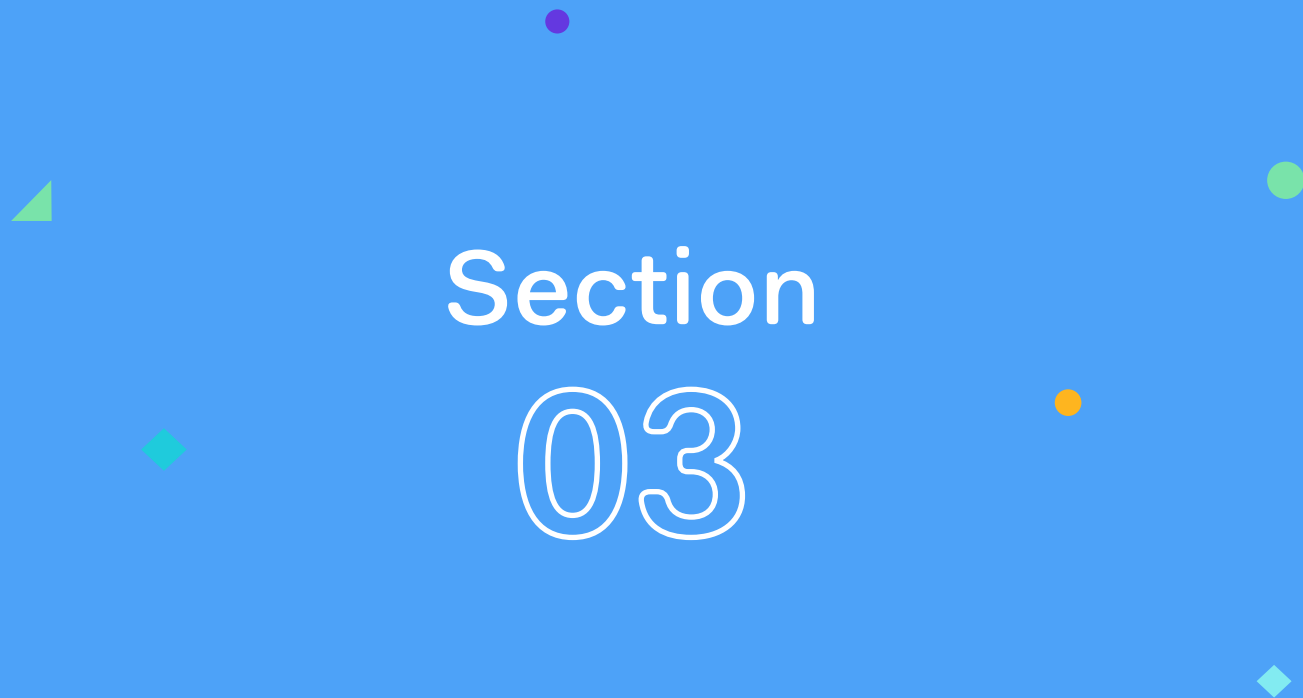# What does a project manager do on a daily basis?

So we know the basic project manager job description ("they manage projects") and some of the project manager accountabilities. But what does it all actually look like IRL?

It's a fast-paced job, and no two days are the same. Depending on which phase each project is at, a project manager's daily duties and responsibilities could include any of the following:

- Meet with leadership to decide the scope of an upcoming project

- Pitch to the finance team to increase the budget

- Outline a [project charter](#)

- Create a risk assessment report

- Check-in with the project team for a daily standup and progress report

- Update the calendar to reflect timeline shifts

- [Manage and re-allocate tasks](#) across the team to make sure no one's overcapacity

- Check-in with a team member who's struggling with their workload

- Moderate a post-mortem project meeting and gather feedback

So now that you're no longer wondering "what does a project manager do?" and you have a clearer sense of what a PM does on a daily basis, you might be thinking "hey, that's something I would be into!" So if you want to do what a PM does, [here's what you need to know](#).

Section

03

How to become a project manager: The 2021 guide

Interested in becoming a project manager? Whether you want to improve your PM skills on the job or make it official with a certification, here's what you need to know.

teamwork.

Now that you know why project management is so important and you understand what a project manager actually does, you might be wondering how you can become a project manager yourself.

Being a project manager is a rewarding career. It's a role that gives you an opportunity to make a real difference to a company's bottom line. And as demand for project-based work grows, the Project Management Institute projects (*heh*) that employers are going to need to fill 2.2 million new project-oriented roles each year through 2027.

2.2 million.

Each.

Year.

That is, to use the technical term, absolutely bonkers.

With that kind of opportunity on the horizon, and with all the development opportunities for managers that come with it, it's no wonder that more and more people are exploring the project manager career path and looking to learn how to become a project manager.

Whether you plan to go the traditional route and want to know what degree you need to become a project manager, or whether you're one of the thousands of people who are already managing projects every day wondering how to become a project manager without experience, we've broken down everything you need to know to become a project manager in our definitive guide.
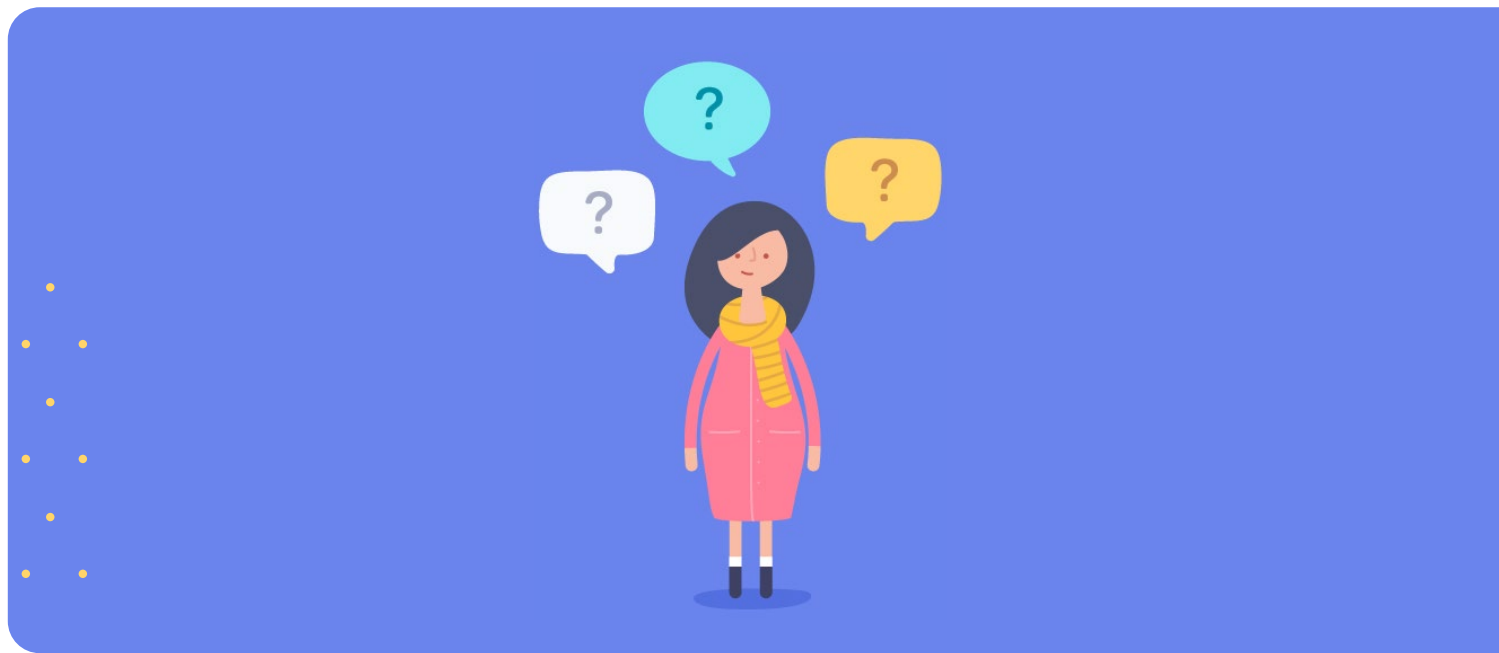
Becoming a project manager: Some frequently asked questions

To get started, let's take a quick look at some of the most frequently asked questions about becoming a project manager.

You're a busy person. You probably have projects to manage right now! So if you're just here for the TL;DR, we've compiled some of the most frequently asked questions about how to become a project manager.

This is the rapid-fire breakdown for when you have things to do and places to be.

Looking for some more comprehensive, in-depth insights? Keep reading for more on how to become a project manager.
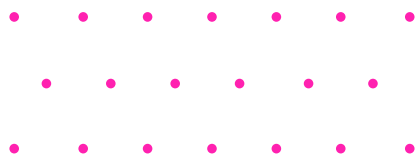
What is a project manager?

A project manager is someone who is responsible for managing a piece of work from concept to delivery.

Who is a project manager?

Anyone who manages projects (i.e. pieces of work) from beginning to end is a project manager. That includes people with "project manager" in their job title or job description, of course — but it also includes people who oversee, coordinate and deliver on work regardless of their defined role.

How do I become a project manager?

There are two main roads on the career path to becoming a project manager. You can either go the "traditional" route — i.e. set out to become a project manager, get a qualification, and take a role as a project manager. Or you can keep gaining project management experience and working your way up the project management career ladder without a degree, certification, or other "classical" project manager education.

What degree do you need to become a project manager?

Being a project manager is about more than just degrees and qualifications. While there are lots of certifications you can take if you want to, having a degree is not required. There are many other steps to becoming a project manager that you can take.

Awesome! So how do I become a project manager without experience?

Whoa, slow down there. We didn't say *that*.

Do you need a degree to become a project manager? Not necessarily. Do you need project manager experience? Yes, yes you do. In fact, the career path to becoming a project manager without a degree is all about developing your hands-on project management experience.

But don't worry, it's not quite the chicken-and-egg situation it sounds like. Project manager experience — and the project manager skillset — is probably something you've been developing without even realizing.

So if you're looking to become a project manager without experience, the first thing to do is...start getting experience in project management. (And if you're wondering, we have more detailed tips on how to do that below.)

Phew. Now that we've covered the basics, let's focus on the specifics.

How do I become a project manager?

As mentioned above, nowadays there are two types of project manager.

- **The "traditional" project manager:**
  Someone who intentionally embarked on the project management career path and has a degree or qualification in project management.what's expected.

- **The non-project manager project manager:**
  Also known as an accidental project manager. These are the people who never set out to become project managers but who find themselves managing projects as part of their daily work anyway. NPMPMs can be anyone: marketers planning a campaign, product managers coordinating the development of a new product, web designers creating a new website. They walk among us.

For anyone wondering how to become a project manager, this is good news: it means that there are more ways than ever to get on that project management career ladder.

Let's start with the NPMPM or accidental project manager route.
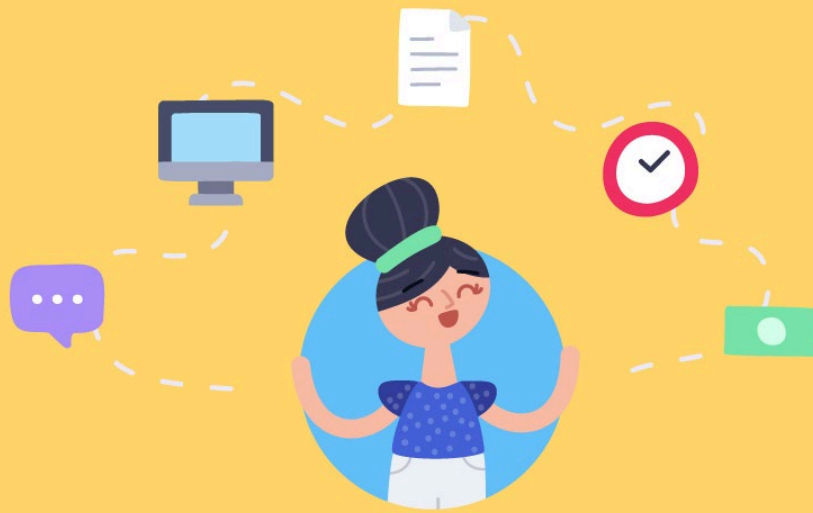
Pathway 1: How to become a project manager without a qualification

Earlier in this guide, we talked about how more people are already project managers than they realize.

Most work involves projects. And most projects involve lots of moving parts — like research, planning, budgeting, coordinating, managing resources, and much more — that all need to be managed and overseen correctly to make sure that your project stays on track.

If you're starting to find that you're loving the thrill of the project management side more than any other aspect of your job, here's how to break into project management without a degree.

1. Learn where the gaps in your project management knowledge are

Whatever role you're currently in — marketer, designer, developer, whatever — you've likely been honing your project management skills all along.

According to the Project Management Institute's *Guide to the Project Management Body of Knowledge* (or PMBOK Guide), there are 10 key project management "knowledge areas":

- Integration management
- Scope management
- Schedule management
- Cost management
- Quality management

- Resource management
- Risk management
- Communications management
- Procurement management
- Stakeholder management

Think about the projects you've been on lately. Which of these areas have you been involved in?
Maybe you played an integral role in outlining the project plan, timeline, or scope.
Maybe you were the one who outlined the budget and were able to stop things going off-track when unexpected costs came up.

Maybe you helped to reallocate resources across team members to ensure that no one was over capacity.

Those are all project management skills that any great project manager needs to know.
On the flipside, maybe you haven't had much exposure to some of the other knowledge areas, like risk management or stakeholder management. In that case, you know exactly what you need to focus on to gain the experience you need to become a more well-rounded project manager.

2. Get (more) project management experience

Once you've identified where you need to grow, it's time to start putting your plan into action. (Which is what project managers do every day — double win!)

That's because the #1 thing you can do if you want to become a project manager without experience is **start getting that experience.**

Projects are all around us, so volunteer when you can. Take on extra responsibilities and develop your organizational skills, scheduling skills, people management skills — everything you identified in step one.

3. Learn everything you can about project management

Always seek out opportunities to develop your project management skills and knowledge.

Learn by doing. Learn on the job. Learn from your mistakes. Learn from other project managers (in your company or elsewhere). See if you can find a mentor who'll teach you their project manager tips.

If you want to pursue your project manager education but you don't yet feel ready to fully commit, take one of the many online project management courses available on platforms like Udemy or Coursera.

4. Start using the right project management software

Using a project management tool can help you to develop your project manager experience.

It allows you to automate your work, quickly assign tasks to groups of teams, and easily view projects in Gantt charts, as well as being able to manage all of your project resources from one place.

Using a flexible and intuitive project management tool like Teamwork to manage your work also means that you can get up and running without needing to spend a ton of time on training or onboarding.
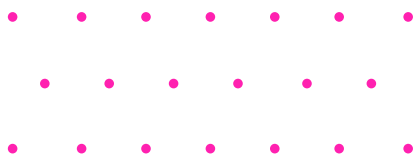
Pathway 2: How to become a certified project manager

Whether you've been an accidental project manager for a while and you're looking to add a formal qualification to your CV, or have always known that you wanted to be a project manager when you grew up, a qualification is a great way to signal your expertise and commitment to the PM career path to employers.

Even though a formal qualification is no longer a necessity to become a project manager (see: all of the above), it's still worth considering if you're really serious about upping your project management game.

Not only will it make more job opportunities available to you and give you a higher earning power, but it will also teach you some project management best practices and techniques that you might not otherwise have been exposed to.

1. Identify which project management certification is right for you
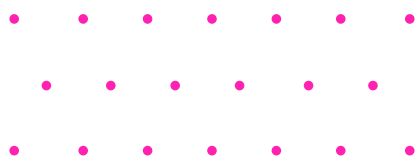
PMP, PRINCE2, CAPM, PMI-ACP…there's a whole alphabet of project management degrees. It can be overwhelming. So how do you know which project management certification is right for you?

The first step is to check out your options. Which qualification is most common in your industry? Which one do you see listed most in the kind of job descriptions you're interested in? Which one is best suited to your available time and budget? Which one will better fit the kind of processes your company uses? Where in the world do you want to work?

There's lots to consider. Here's an overview of some of the most popular degrees for project managers, to help start your formal project manager education.

Project Management Professional (PMP)

The Project Management Professional (PMP) is a certification offered by the Project Management Institute (PMI), the leading global organization for project management professionals.

t's one of the most popular and well-recognized qualifications in the field — and it can have a major impact on your salary. According to the PMI, project managers (and other project management professionals such as PM consultants, PM specialists, and program managers) with PMP certifications report 23% higher salaries on average.

The PMP qualification is based on the PMI's standards and guidelines as outlined in "A Guide to the Project Management Body of Knowledge, or PMBOK Guide.

It's aimed at people who already have project management experience (at least 4,500-7,500 hours of it, to be specific), as well as either 35 hours of project management education or a CAPM certification.

So while it's not for absolute beginners, it's definitely one to consider as you build out your project management portfolio.

For more on the requirements and process, check out the official PMP site here.

Projects In Controlled Environments (PRINCE2)

PRINCE2 stands for **PR**ojects **IN C**ontrolled **E**nvironments, which also emphasizes how it differs from a PMP certification.

While the PMP certification is knowledge-based — i.e. it focuses on general project management knowledge and best practices for each stage of the project — the PRINCE2 is project- and process-based method in and of itself.

Unlike the PMP, it doesn't have the same prerequisites, so it might be more suited to someone looking for a PM grounding at the beginning of their project management career.

It also comes in both Foundation and Practitioner flavors for every stage of your project management journey.

If you're trying to decide between a PMP and a PRINCE2 certification, there are a few other factors that should influence your decision, such as industry and geographical location (both of which can affect which qualification is preferred).

Ultimately, it's not an either-or situation. Both certifications have benefits, and the two certifications can actually complement each other.

Learn more about getting a PRINCE2 certification here.

Certified Associate In Project Management (CAPM)

The Certified Associate in Project Management (CAPM) is an entry-level project management qualification offered by the PMI. It can be a standalone certification, or you can use it as one of the "prerequisites" needed to progress to getting a PMP.

The CAPM provides you with a foundational knowledge of project management based on the standards and guidelines outlined the PMBOK Guide.

Learn more about the CAPM certification here.

Agile certifications

If you work in an industry where agile practices are the norm, you might decide to get an agile certification instead (or as well!).

The PMI offers a qualification specifically designed for agile practitioners, the PMI Agile Certified Practitioner (PMI-ACP).

There's also an agile-specific PRINCE2 certification, PRINCE2 Agile, which is available at both Foundation and Practitioner levels.

Depending on which agile methodologies you (and your organization) prefer, you could also choose to specialize even more. For example, if you're a Scrum aficionado, you might decide to become a Certified ScrumMaster with the Scrum Alliance.

It all depends on what processes and frameworks your industry (and company) prefers to use — so do your research, talk to others in the field, and decide what the best agile certification for you is.

2. Get (and maintain) your qualification in project management

You probably thought there was going to be more steps to becoming a certified project manager than just:

01. Decide which project management certification you want.

02 Get the certification.

But once you've decided which project management certification is right for you, it's all about knuckling down, putting in the hours, and preparing for the certification exam. You might also need to log more practical hours as well as making time for all the book-learning.

There are lots of prep courses available online that can help you to study and prepare for the exam, but ultimately, it's all about putting in the time and effort. (You can do it! We believe in you!)

Then once you've got your certification, you need to maintain it.

Most project management certifications — such as the PMP — expire after a few years. This means that you'll need to retake the exam every few years to show that you're still up-to-date with PM best practices and standards.

3. Master the tools of the trade

As a project manager, you're always looking for ways to increase efficiency and improve processes.

Finding the right project management tool will help you to put everything you've learned in your project manager education into practice. It allows you to oversee your projects with more clarity, forecast more accurately, manage your resources more efficiently, and report more precisely.

A good project management tool amplifies the work of the project manager: it helps you to take care of the everyday details so you can focus your skills where they'll have the most impact. It works with you to elevate your best practices and scale your project successes — so learning how to use your PM tool to your advantage is essential, and will save you tons of time and money in the long run.

Teamwork was built to support you and your workflow, regardless of which project management methodology you use. Whether you need a Gantt chart or a Kanban board, it has all the features you need to deliver your project, your way.
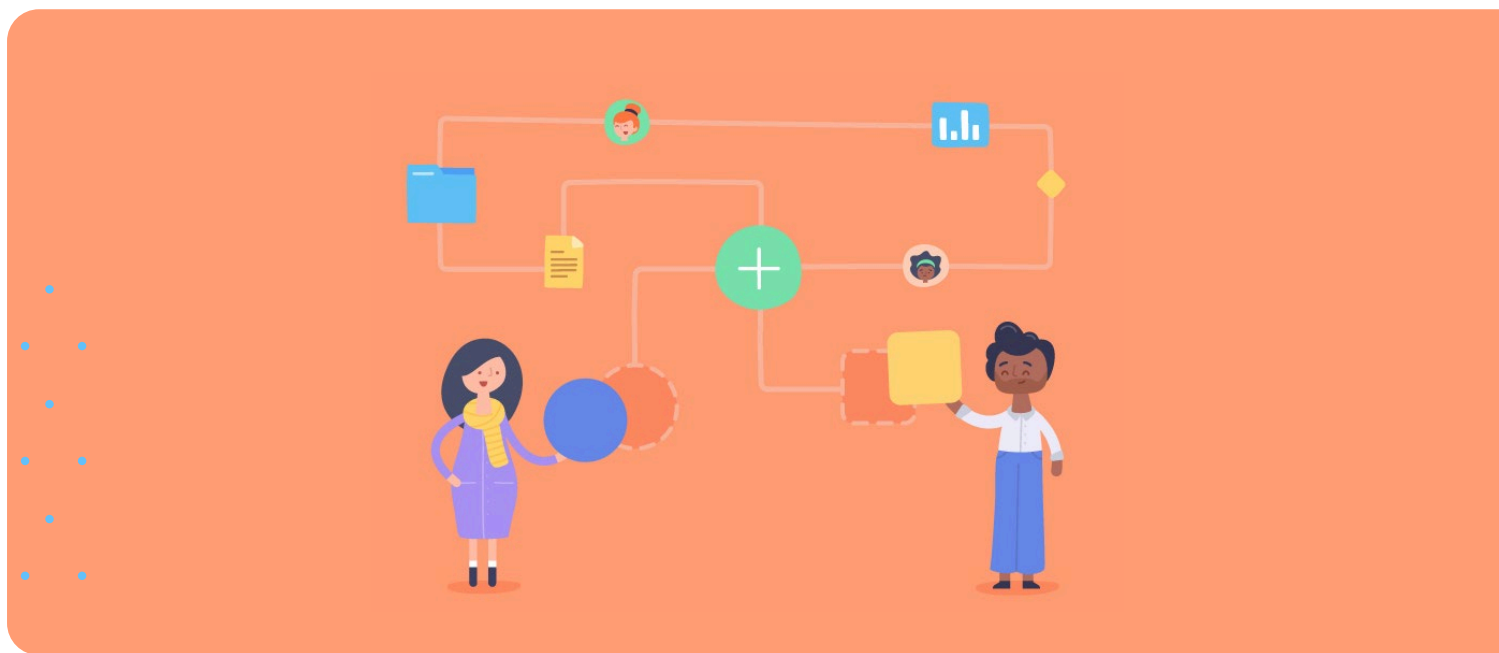
The steps to becoming a project manager

01.	Start managing projects.		**05.**	Get better at managing projects.
02.	Keep managing projects.		**06.**	Decide if you want to get a project management certification.
03.	Learn the skills and theory behind managing projects.		**07.**	Continue to manage projects.
04.	Use Teamwork to manage your projects.			

That's it, I'm becoming a project manager!: If you're ready to start developing your project manager experience, look out for these project management methodologies you need to know.

Section

04

Which project management methodologies should you use?

With approximately 8,462 project management methodologies to choose from, how do you know which one is right for you and your team? Find the best approach for your project with our handy guide to popular PM methodologies.

teamwork.

Once you've decided you want to become a project manager, the next step is to figure out which project management methodologies are right for you and your team.

The landscape of project management methodologies can seem a bit overwhelming.

Whether you have a formal project management certification or you're learning to become a project manager from experience, there's an absolute smorgasbord of project methodologies to choose from. And they often come with their own rules, lists, principles, and endless acronyms.

We believe that finding the right project management methodology to manage your work shouldn't be rocket science. So we've compiled this list of different project management methodologies to help you figure out which methods, principles and approaches you can use for each team and project.
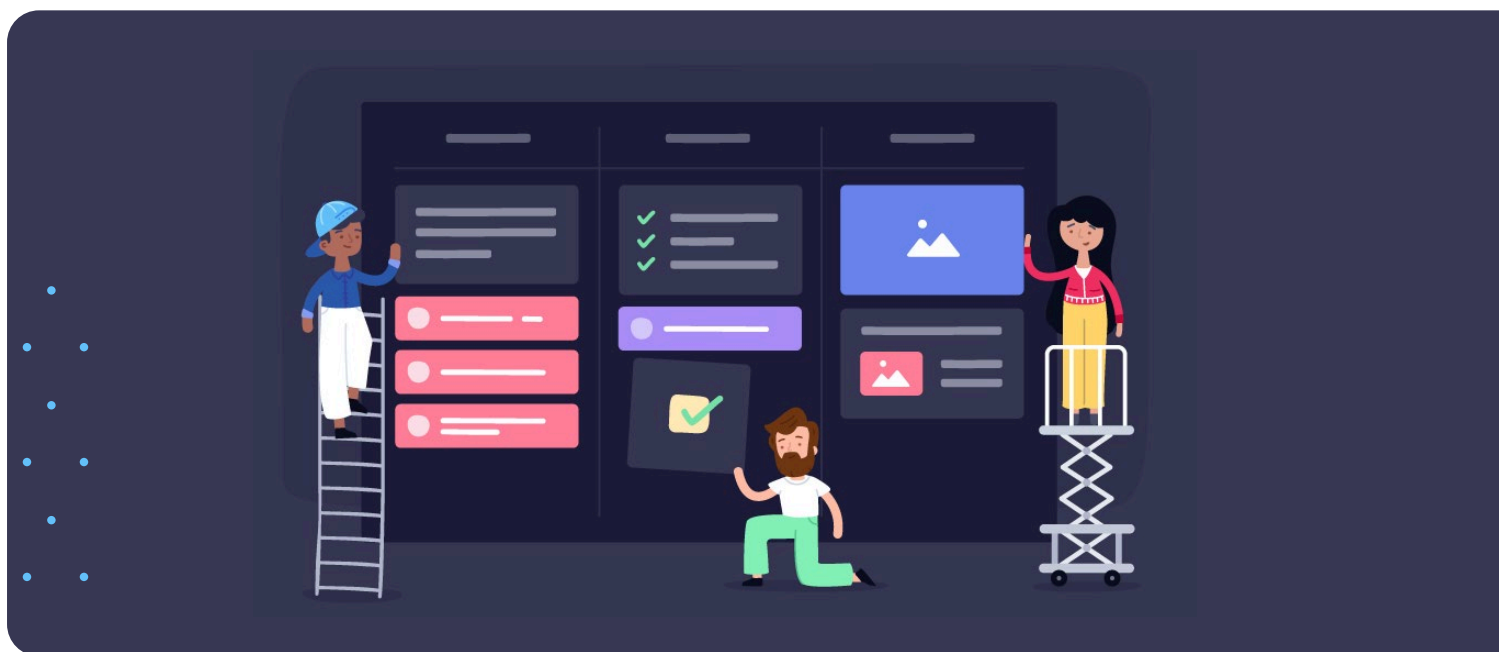
What is a project management methodology?

A project management methodology is a set of principles and practices that guide you in organizing your projects to ensure their optimum performance.

Huh?

Basically, it's a framework that helps you to manage your project in the best way possible.

Project management is so important to organizations and teams, but in order for it to be really effective, you need to make sure you're correctly mapping your project management methodology to your team type, project, organization, and goals.

Why are there so many different project management methodologies?

No two projects are exactly the same (even when you're using handy features like project templates to replicate your past successes).

And when you factor in the different goals, KPIs and production methods of not only different types of teams but also different types of industries, it makes sense that there's no one-size-fits-all approach to managing a project.

What works best for one type of team could be an absolute nightmare for another.

For example, many software developers started to find that traditional project management methods were hindering — rather than helping — their workflows and negatively affecting their performance and results.

As a result, software teams began to develop a new type of project management methodology, which was designed to address their particular concerns.

Before long, other teams and industries started to adapt those new project management methods to fit their unique needs and concerns. And on and on, with different project management methodologies being repurposed and adapted for different industries and tweaked to fit specific use cases.

What we're left with is a ton of different project management methodologies to choose from. So how do you know which project management method (or methods, plural) is right for you and your team?

How do you choose the right project management methodology?

There are lots of factors that will impact which project management methodology is right for your project, team, and organization. Here's a quick breakdown of some of the key considerations that can help you decide:

- **Cost and budget:** On a scale of $ to $$$, what sort of budget are you working with? Is there room for that to change if necessary, or is it essential that it stays within these predetermined limits?

- **Team size:** How many people are involved? How many stakeholders? Is your team relatively compact and self-organizing, or more sprawling, with a need for more rigorous delegation?

- **Ability to take risks:** Is this a huge project with a big impact that needs to be carefully managed in order to deliver Very Serious Results? Or is it a smaller-scale project with a bit more room to play around?

- **Flexibility:** Is there room for the scope of the project to change during the process? What about the finished product?

- **Timeline:** How much time is allotted to deliver on the brief? Do you need a quick turnaround, or is it more important that you have a beautifully finished result, no matter how long it takes?

- **Client/stakeholder collaboration:** How involved does the client/stakeholder need — or want — to be in the process? How involved do you need — or want — them to be?
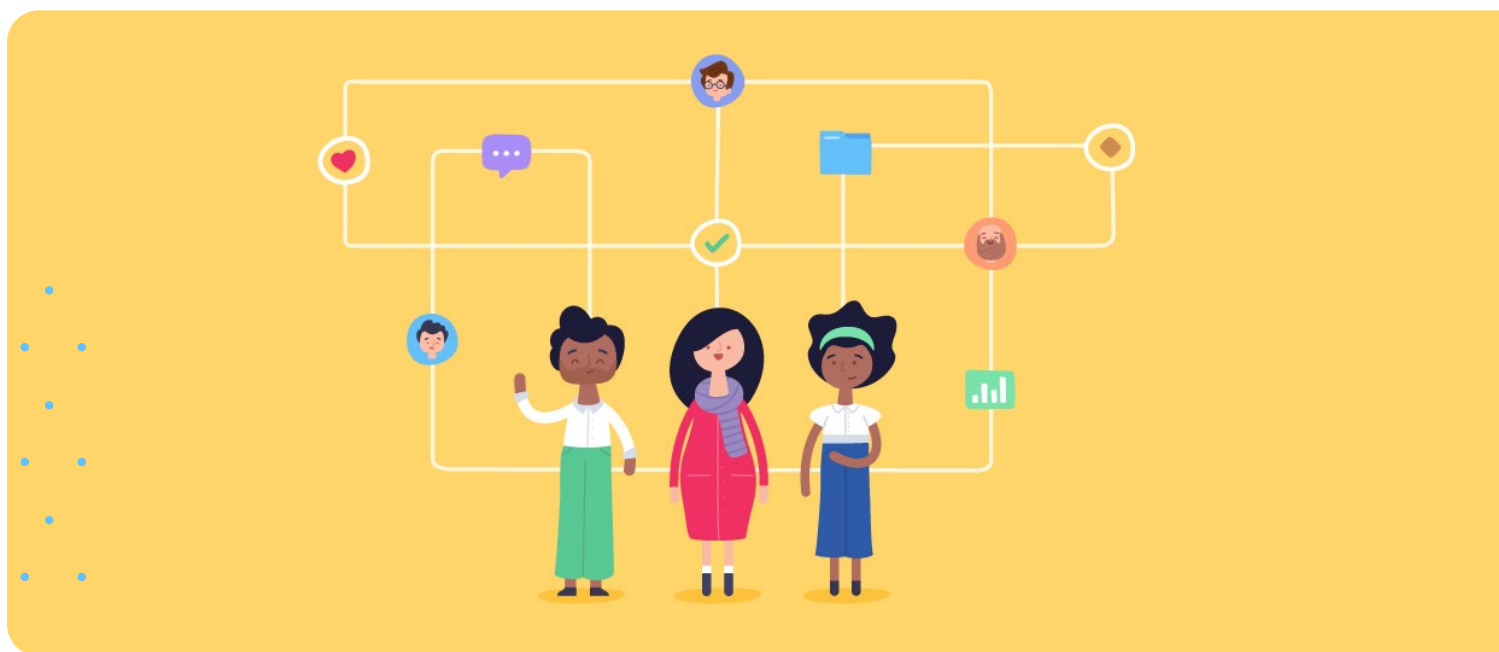
The project management methodologies list

We've compiled this list of project management methodologies to help you get to grips with the basics.

While it's not completely comprehensive, our aim is to provide you with an overview of some of the different methodologies out there, so you can see what's out there and figure out which one might be a good fit for your particular projects.

(We've also added a quick list at the end of this post with a breakdown of which project management methods are often used in which industries, if you want to cut right to the chase.)

Ready? Okay! Let's dive right in.

1. Waterfall methodology

The Waterfall method is a traditional approach to project management. In it, tasks and phases are completed in a linear, sequential manner, and each stage of the project must be completed before the next begins.

The stages of Waterfall project management generally follow this sequence:

- Requirements
- Analysis
- Design
- Construction
- Testing
- Deployment & maintenance

Progress flows in one direction, like a real waterfall.

Also like a real waterfall, though, this can quickly get dangerous. Since everything is mapped out at the beginning, there's a lot of room for error if expectations don't match up with reality. And there's no going back to a previous stage once it's completed (just imagine trying to swim against a waterfall — not fun).

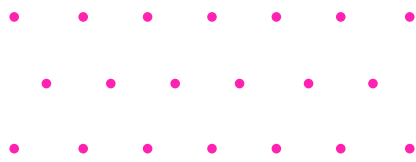**Try this project management methodology if:**

- The end goal of your project is clearly defined — and isn't going to change.

- The stakeholders know exactly what they want (and it isn't going to change).

- Your project is consistent and predictable (i.e. isn't going to change).

- You're working in a regulated industry that needs extensive project tracking or documentation.

- You might need to bring new people into the project midway through and get them up to speed quickly.

2. Agile methodology

The agile project management methodology came from a growing dissatisfaction with the linear approach of traditional project management methodologies.

Frustrated with the limitations of project management methods that couldn't adapt with a project as it progressed, the focus began to shift to more iterative models that allowed teams to revise their project as needed during the process instead of having to wait until the end to review and amend.

The concept of agile project management has gone on to spark several specific sub-frameworks and methodologies, such as scrum, kanban, and lean. But what do they all have in common? The key principles of agile project management methodologies are:

- It's collaborative.

- It's quick.

- It's open to data-driven change.

As such, agile project management methodologies usually involve short phases of work with frequent testing, reassessment, and adaptation throughout.

In many agile methods, all of the work to be done is added to a backlog that teams can work through in each phase or cycle, with project managers or product owners prioritizing the backlog so teams know what to focus on first.

Try this project management methodology if:

- Your project is liable to change.

- You're not sure at the outset what the solution will look like.

- You need to work quickly, and it's more important that you see speedy progress than perfect results.

- Your stakeholders or client needs (or wants) to be involved at every stage.

This project management methodology isn't for you if:

- You need a lot of documentation (for example, if you'll be bringing new people on-board during the project).

- You need a predictable deliverable, and you need to be crystal clear about what that looks like from the outset.

- Your project can't afford to change during its course.

- You don't have self-motivated people.

- You have strict deadlines or deliverables that you need to stay on top of.

3. Scrum methodology

Scrum is a form of agile project management. You can think of it more like a framework than as a project management methodology in itself.

With Scrum, work is split into short cycles known as "sprints", which usually last about 1-2 weeks. Work is taken from the backlog (see: Agile project management, above) for each sprint iteration,

Small teams are led by a Scrum Master (who is not the same as the project manager) for the duration of the sprint, after which they review their performance in a "sprint retrospective" and make any necessary changes before starting the next sprint.

Try this project management methodology if:

- You're striving for continuous improvement.

This project management methodology isn't for you if:

- You don't have the full commitment from the team needed to make it work.

4. Kanban methodology

Kanban is another method within agile project management.

Originating from the manufacturing industry, the term "kanban" has evolved to denote a framework in which tasks are visually represented as they progress through columns on a kanban board. Work is pulled from the predefined backlog on a continuous basis as the team has capacity and moved through the columns on the board, with each column representing a stage of the process.

Kanban is great for giving everyone an immediate visual overview of where each piece of work stands at any given time. (You can use kanban boards for everything from your content marketing process to hiring and recruitment.)

It also helps you to see where bottlenecks are at risk of forming — if you notice one of your columns getting clogged, for example, you'll know that that's a stage of your process that needs to be examined.

When used as part of an agile project management methodology, it's also common to implement work in progress (WIP) limits. Work in progress limits restrict the amount of tasks in play at any given time, meaning that you can only have a certain number of tasks in each column (or on the board overall).

This prevents your team from spreading their energy across too many tasks, and instead ensures that they can work more productively by focusing on each task individually.

Try this project management methodology if:

- You're looking for a visual representation of your project's progress.

- You want at-a-glance status updates.

- You want to encourage using WIP limits so your team can stay focused.

- You prefer to work on a continuous "pull" basis.

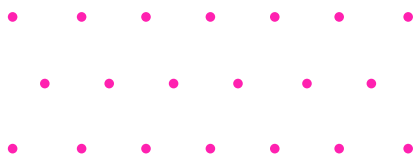**This project management methodology isn't for you if:**

- Your process is super complex or has tons of stages.

- You want a push system instead of a pull system.

5. Scrumban methodology

It's the answer to the age-old question: what if scrum and kanban had a baby?

Scrumban is a hybrid agile project management methodology that has scrum's nose and kanban's eyes.

The main benefit of scrumban as a method is that instead of deciding which task from the backlog to work on in each sprint at the outset (like you would in a "traditional" scrum framework), scrumban allows teams to continuously "pull" from the backlog based on their capacity (like they would in a kanban framework).

And using work in progress limits (from kanban) during your sprint cycle (from scrum), you can keep a continuous flow while still incorporating planning, reviews and retrospectives as needed.

Try this project management methodology if:

- You've ever looked at scrum and kanban and thought "I wish those two crazy kids would get together".

This project management methodology isn't for you if:

- You've ever looked wistfully out the window and thought, "Oh, scrum is scrum, and kanban is kanban, and never the twain shall meet".

6. eXtreme programming (XP) methodology

The eXtreme Programming (XP) methodology is another form of agile project management that was designed for software development.

It emphasizes teamwork and collaboration across managers, customers, and developers, with teams self-organizing. It has a defined set of rules that teams should follow, which are based on its five values: simplicity, communication (face to face is preferred), feedback, respect, and courage.

Try this project management methodology if:

- You want to foster teamwork and collaboration.

- You have a small, co-located team.

This project management methodology isn't for you if:

- You're a rulebreaker.

- Your team is spread across different places and time zones.

7. Adaptive project framework (APF) methodology

The adaptive project framework (APF) methodology, also known as adaptive project management (APM), is a type of agile project management methodology that was designed with the inevitability of change in mind.

The adaptive project framework knows that, as John Steinbeck might say, even the best-laid projects of mice and men often go awry. So the fundamental attribute of APF is that teams need to be able to adaptively respond to change.

That means that using adaptive project framework methods, teams must try to anticipate the risks and prepare for the unexpected in their project. They need to understand that key components are constantly in flux, and be able to constantly re-evaluate results and decisions with these moving parts in mind.

This requires lots of communication with all stakeholders and — like other agile project management methodologies — be able to work collaboratively.

Try this project management methodology if:

- You know your ultimate goals (in project management terms, you've outlined your Conditions of Satisfaction; or, in Beastie Boys terms, you're clear about you're clear about whatcha whatcha whatcha want).

This project management methodology isn't for you if:

- You need predictability.

- You don't have the resources to handle the potential negatives of adaptability (e.g. scope creep, rework, misuse of time).
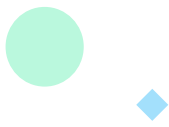
8. Lean methodology

Lean is another project management methodology that has its origins in manufacturing (and specifically the Toyota Production System). It's all about applying lean principles to your project management methods to maximize value and minimize waste.

While this originally referred to reducing physical waste in the manufacturing process, it now refers to other wasteful practices in the project management process. These are known as the 3Ms: muda, mura, and muri.

Muda (wastefulness) consumes resources without adding value for the customer.

Mura (unevenness) occurs when you have overproduction in one area that throws all of your other areas out of whack, leaving you with too much inventory (wasteful!) or inefficient processes (also wasteful!).

Muri (overburden) occurs when there is too much strain on resources such as equipment and people, which can often lead to breakdowns — in both machines and humans.

Using the key principles of lean, a project manager can reduce these types of waste to create more efficient workflows.

Try this project management methodology if:

- You're looking for a set of principles that will help you cut the fat and optimize your flow.

- You're always trying to improve and add value for the customer.

- You want to ultimately decrease costs.

This project management methodology isn't for you if:

- You can't afford to run into supply problems (e.g. you don't have enough inventory in stock) or lose room for error (e.g. in the case of essential equipment failure).
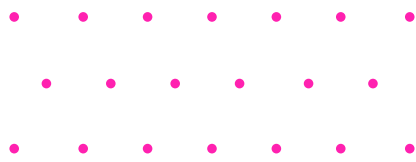
- You don't have the budget to invest in it (while lean project management aims to reduce costs overall, it can be costly to implement).

- You're a raccoon and you love waste, actually.

9. Critical path method

The critical path method (also known as critical path analysis) is a way of identifying and scheduling all of the critical tasks that comprise your project, as well as their dependencies.

That means that you need to:

01. Identify all of the essential tasks you need to do to achieve your project goal

02. Estimate how much time each of those tasks will take (bearing in mind that certain tasks will need to be completed before others can be started)

03. Use all of that information to schedule the "critical path" you'll need to take in order to get the project done as quickly as possible without missing any crucial steps.

The longest sequence of critical tasks becomes your critical path, and will define the timeframe for your project.

Along the path, you'll have milestones to meet that will signal when one set of tasks (or phase) is over and you can move on to the next one.

There are lots of ways to visualize the critical path, depending on the complexity of your project, from flow graphs to Gantt charts.

Try this project management methodology if:

- Your project is large-scale and complex.

- Your project has a lot of dependencies.

- You're looking for a visual way to map out the sequence of tasks.

- You need to identify which tasks are the most important so you can better allocate your resources.

- You have a strict plan and deadlines, with no room for silly business.

- You love algorithms. Love 'em!

This project management methodology might not be for you if:

- You don't need something with a lot of complexity.

- You're unsure about deadlines, timings, or durations.

- Your project needs wiggle room to change.

10. Critical chain project management

Critical chain project management (or CCPM) takes the critical path method (CPM) one step further.

While the critical path method defines the length of time needed to get each critical activity done from the beginning of the project to the end, it can often be, well, unrealistic when the time comes to actually put it into practice.

Critical chain project management addresses those issues by allowing a bit more time for the human elements of your project — like delays and resourcing issues.

In critical chain project management, you have a few buffers built in that your critical chain can use without derailing everything else, so that your entire project doesn't have to go off track just because life happens.

Try this project management methodology if:

- You like the sound of the critical path method, but you want something a little more realistic.

- You were already overestimating task durations in CPM to allow for a buffer and you want more accurate data on how long the work is actually taking compared to your projections.

This project management methodology isn't for you if:

- You think buffers are just a safety net for people who didn't plan it right the first time.

- Nothing could possibly go wrong.

11. New product introduction (NPI)

New product introduction is a great project management methodology for when you want to, well, introduce a new product.

Also known as new product development (NPD), the new product introduction process covers everything you need to define, develop and launch a new (or improved) product.

The project follows a single product through the entire development process. This process involves multiple phases or a stage-gate process, which can vary from organization to organization, but usually include things like:

01. Defining the product spec and project scope

02. Evaluating the feasibility

03. Developing the prototype

04. Validating the prototype via testing and analysis
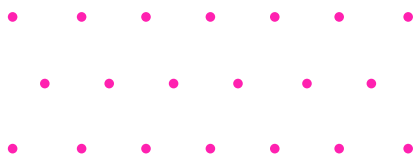
05.   Manufacturing the product on a larger scale

06.   Evaluating the product's success in the market after launch

As the requirements for a successful new product introduction span a number of departments across an organization, from leadership to product managers to marketing and more, it requires a lot of cross-functional collaboration and communication.

Try this project management methodology if:

- You're bringing a new or improved product to market.

- You're focusing on a single product.

- You want to foster key stakeholder and cross-functional alignment right from the beginning.

This project management methodology might not be for you if:

- You're not bringing a new or improved product to market.

- You're looking for a more agile approach to product development (as NPI is usually sequential rather than iterative).

12. Package enabled reengineering (PER)

Package enabled reengineering (PER) is a project management methodology that aims to help organizations redesign products or processes with fresh eyes. It focuses on facilitating business transformations quickly and strategically, whether through redesign of processes or realignment of people.

Try this project management methodology if:

- Your organization needs an overhaul.

- You need a fresh perspective on your products or processes.

This project management methodology isn't for you if:

- You're not trying to improve an existing system.

13. Outcome mapping

Outcome mapping is a project progress measurement system that was designed by the International Development Research Centre (IDRC). It differs from the other project management methodologies on this list in that it doesn't focus on measurable deliverables; instead, it focuses on creating lasting behavioural change.

It's a common project management methodology used in charitable projects in developing countries. As a project management methodology, it's less about the project itself than the long-term impact of the project and its ability to effect change in the community. As a result, it measures influence rather than other (perhaps more "typical") measures of project progress.

Outcome mapping consists of a lengthy design phase followed by a record-keeping phase to track the results.

Try this project management methodology if:

- Your project is aimed at changing behaviour rather than producing deliverables.
- Your project is related to change and social transformation (e.g. in the fields of international development, charity, communications, research).

This project management methodology might not be for you if:

- Your project is all about finished products rather than behavioural outcomes.
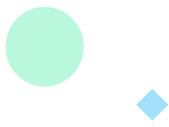
14. Six Sigma

Six Sigma is a method for improving processes with an emphasis on ensuring consistency in output and impeccable quality. (And if it's good enough for Jack Donaghy…)

There are a few different flavors available, such as Lean Six Sigma and Agile Sigma, but ultimately Six Sigma is a business methodology that aims to eliminate defects and reduce variation by using its defined methodologies.

Six Sigma methods can be used to optimize and improve existing processes or create new ones.

To improve business processes, you can use the Six Sigma DMAIC process, which stands for the phases in the project methodology: **D**efine, **M**easure, **A**nalyze, **I**mprove, **C**ontrol.

To create new processes or products, you can use the Six Sigma DMADV process: **D**efine, **M**easure, **A**nalyze, **D**esign, **V**erify.

As a set of principles and techniques (sometimes it's even described as a "philosophy") rather than a project management methodology in itself, Six Sigma methods can be applied alongside many other project management methodologies, like Lean and Agile.

Try this project management methodology if:

- You're looking for a set of principles and philosophies you can bring with you to almost every project and organization.

This project management methodology might not be for you if:

- You don't have a lot of budget to invest in training — it can be expensive to get trained and certified.
- You're looking for a defined process for a particular project rather than a set of guiding rules.

15. PMI's PMBOK

The Project Management Institute's Project Management Book of Knowledge (AKA the PMI's PMBOK) isn't a project management methodology in and of itself. However, it is a best practices guide — and it forms the basis of the PMI's Project Management Professional (PMP) certification, one of the leading project management qualifications.

As such, the PMBOK is an industry-standard set of guiding principles that you can use to ensure that your projects across multiple types of teams and organizations meet the PMI's high standards and comply with best practices.

Try this project management methodology if:

- You have (or want to get) a PMP.

- You want to stay up-to-date with industry standards and best practices.

- You live and work in a place where the PMP is the standard project management qualification (such as the US).

This project management methodology might not be for you if:

- You need a solid project management methodology to map your project, rather than general (albeit helpful) project management knowledge.

16. PRINCE2 methodology

PRINCE2 (**PR**ojects **IN C**ontrolled **E**nvironments) is a project management methodology and certification that aims to equip project managers with knowledge of best practices and processes.

Unlike the PMP certification, it doesn't require a number of prerequisites, making it a good choice for project managers looking to get both a methodological grounding and a qualification.

Also unlike the PMP, PRINCE2 is a methodology in itself. It's guided by seven principles, which in turn dictate the seven processes a project manager needs to use in each project when using PRINCE2.

Try this project management methodology if:

- You're looking for a certification to give you an edge.

- You live and work in a place where PRINCE2 is the standard project management qualification (such as the UK).

This project management methodology might not be for you if:

- You don't want to commit to full certification.

- The seven-step process doesn't map to your projects.

- You find yourself tailoring (or outright ignoring) the process stages so much that it becomes PINO — "PRINCE in name only".

17. Rapid application development (RAD) methodology

Rapid application development (RAD) is a type of agile project management methodology that aims to facilitate faster software development.

It uses rapid prototype releases and iterations to gather feedback in a short period of time, and values that user feedback over strict planning and requirements recording.

Try this project management methodology if:

- You want to be able to give customers/clients/stakeholders a working model much sooner (even if it's not perfect).

- You want to create multiple prototypes and work with stakeholders to choose the best one.

- Speed is of the essence.

- You want to encourage code reuse.

This project management methodology might not be for you if:

- You don't have an experienced team.

- Your clients or stakeholders don't have the time to commit to such a collaborative process or can't give feedback within the necessary timeframes.

- You have a large team.

- You prefer to have a detailed spec that outlines all functional and non-functional requirements.
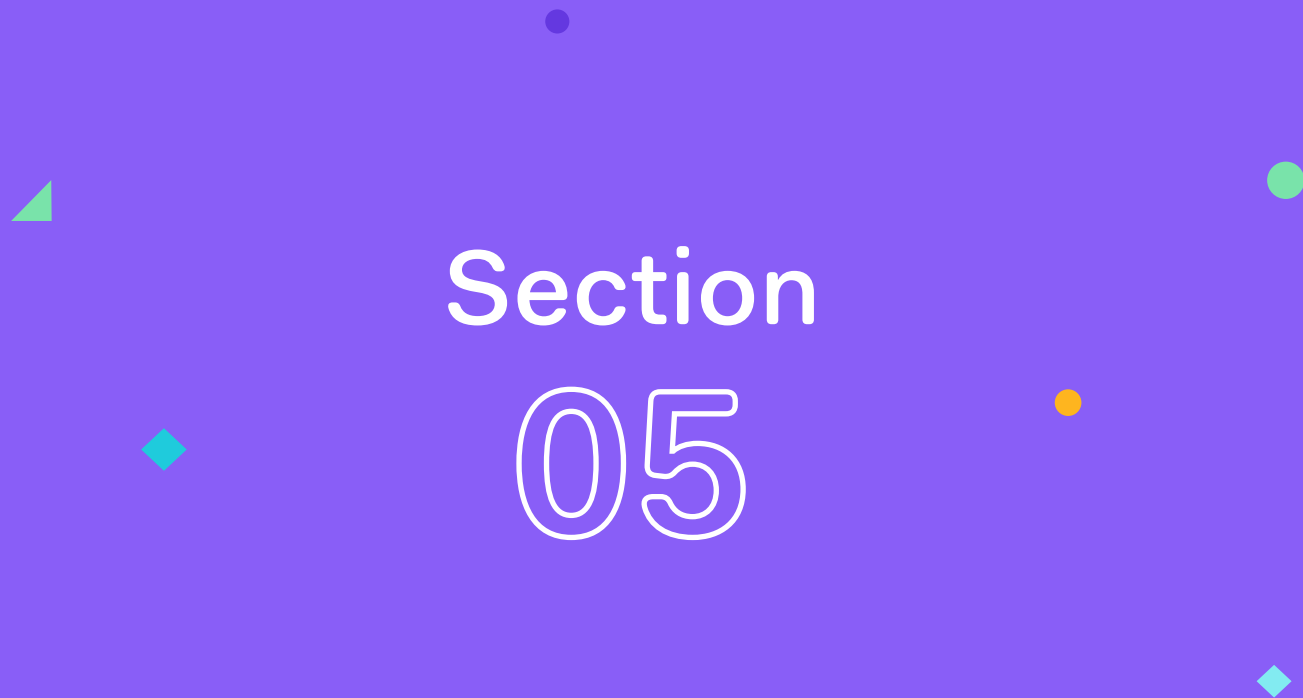

Choosing the right project management methodology

The right project management methodology can elevate your project and help the project manager to get the best out of each team.

Whether you prefer the agile methods favored in [IT project management](#) or the more traditional waterfall project management and critical path methodology used in construction and manufacturing, there's a project management methodology for every team.

But no matter which methodology you go for, you need a collaborative, flexible, and easy-to-use project management tool to support you every step of the way.

Choosing a project management tool that supports multiple methodologies — i.e. that doesn't lock you into one methodology or way of using it — like [Teamwork](#) means that every team in your organization has the freedom to work the way that works for them without sacrificing on features or complexity.

No matter how you like to work, Teamwork helps your team to replicate their best practices, ensure compliance and consistency, and constantly improve their processes.

Section

05

Everything you need to know about agile project management

What is agile project management, how does it work, and can it really help your team to get more done, faster? Here's how you can apply an agile project management approach to your next project.

teamwork.

When it comes to managing your work, there are dozens and dozens of project management methodologies to choose from.

But as you begin your research into which methodology is right for you, you're probably going to see one particular word show up over and over again:

Agile.

It seems to shimmer in your peripheral vision like some sort of project management mirage. Is it real? Can all the avowed benefits of agile project management really be true? Or is it just a trendy buzzword that promises more than it delivers?

It's safe to say that there's a lot of noise around the benefits of agile project management. But what exactly is it? And how do you know if it's a good fit for your team?
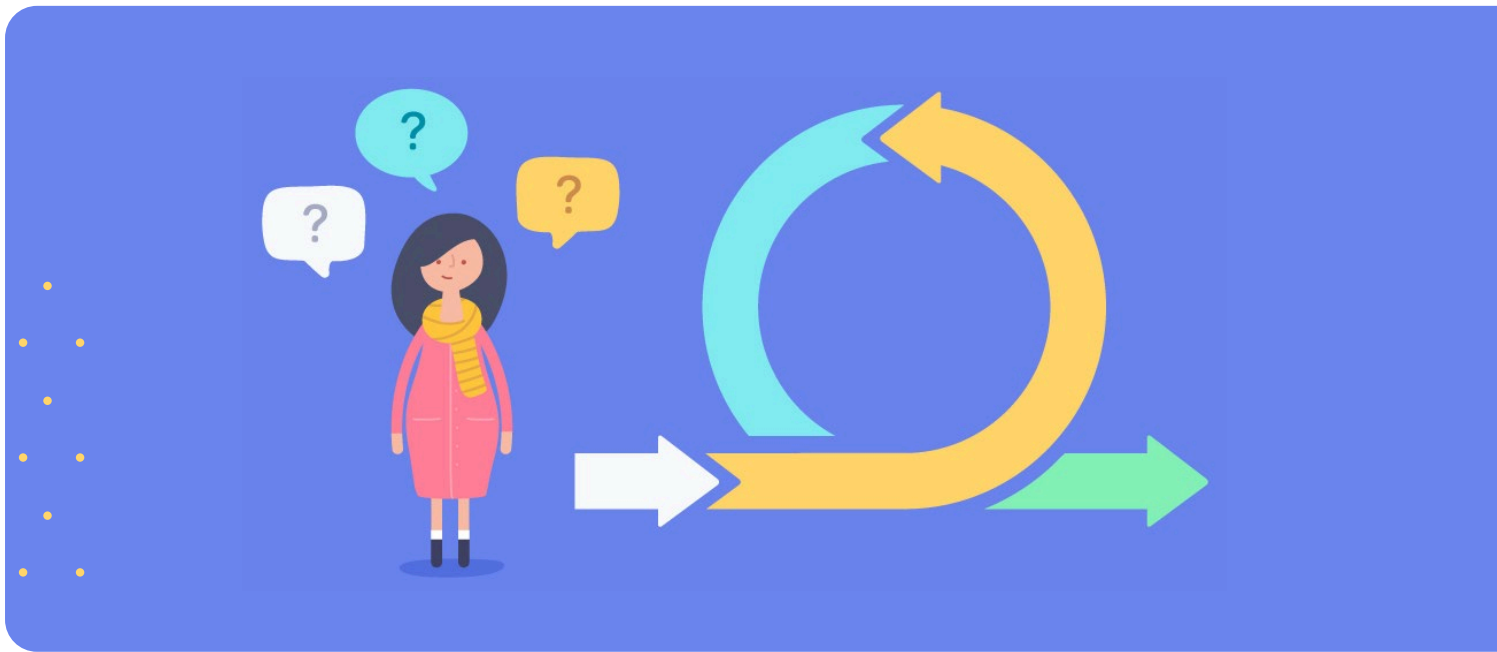
What is agile project management?
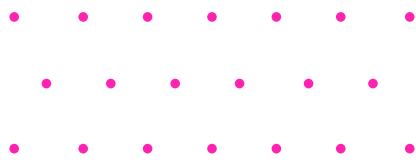
Agile project management is an iterative approach to software development projects and ensures feedback can be acted on quickly and that responsive changes can be made at each stage of a sprint or product cycle.

This allows project teams to adopt agile project management methodologies to work quickly and collaboratively within the timeframe and budget of a project.

Agile project management covers lots of different agile project management methodologies, all of which draw on some shared agile principles and core values.

But, there is no single universal "agile methodology." So where did they all come from?

A brief history of agile

Most current agile project management methods have their roots in software development. Back in the 1990s, software teams were finding that the highly-structured "heavyweight" traditional project management methodologies (for example, Waterfall) just weren't cutting it when it came to the way they needed to work.

They were finding that the pitfalls of these heavyweight methods — such as a lack of flexibility, adaptability, and even autonomy — made it more difficult for them to respond to change or incorporate their learnings as they worked. As the project plans were outlined at the outset, there was no room for surprise, and deviations could be costly.

But as opposed to industries where the process was fixed and the outcome was reliable and stable (think: a manufacturing process that creates the same product on an assembly line), change is a fundamental component of software projects.

Maybe stakeholder requirements pivot, or maybe testing reveals that something isn't working the way it should once an end-user gets their hands on it.

Instead of being held captive by the project management plan they outlined at the start, agile project management methods meant that teams could take those changes into consideration to make the best possible product. To do this, they needed shorter development cycles (called sprints), a more iterative process, and continuous feedback and testing.

Then in 2001, a bunch of software developers got together to discuss the core tenets of agile and really drill down into the philosophy behind it. They came up with The Manifesto for Agile Software Development, a collection of values and principles that would be a North Star for teams wondering how to become agile.
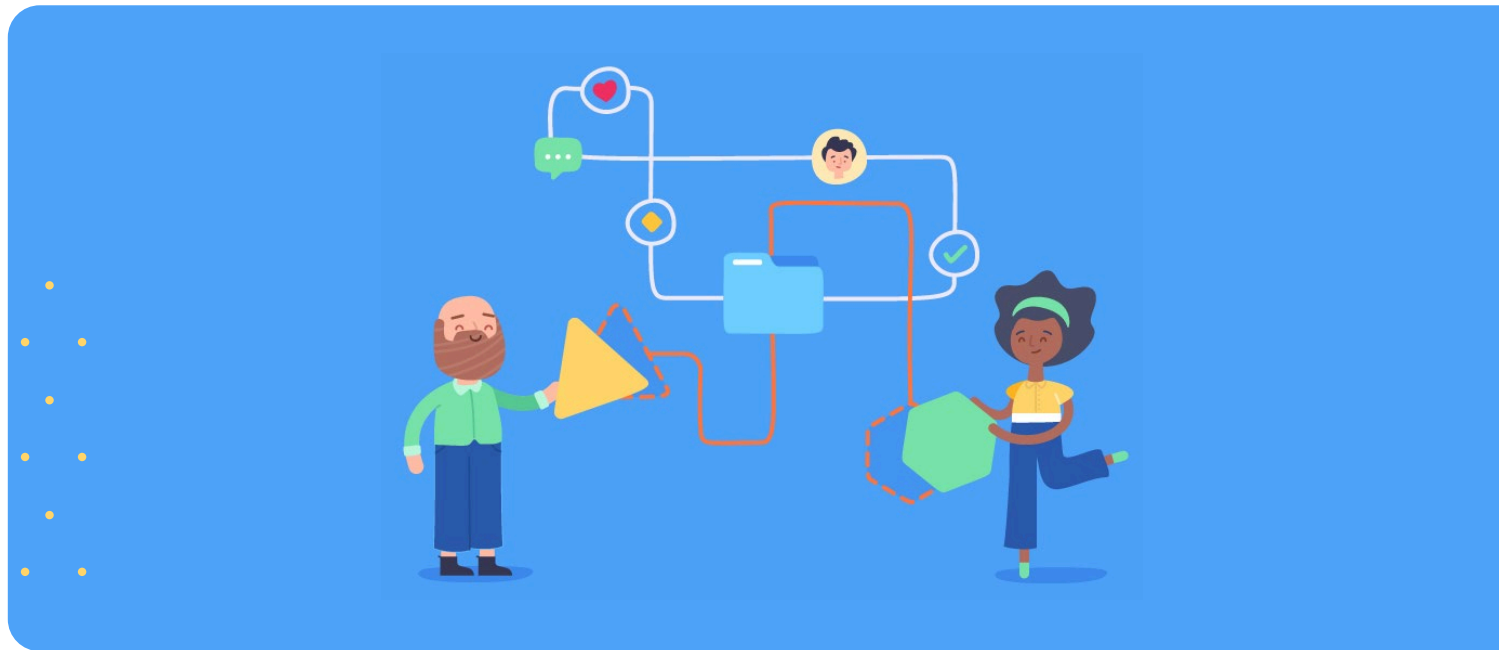
The definition of agile project management

If this all sounds very software development focused, don't worry. Many agile project management methodologies were developed with software in mind, but the core agile values and agile project management principles are useful to many different types of team, from product teams to marketing teams.

Knowing the history of agile project management (or at least the summary of it outlined above) can help to give context some of the terminology and processes that still characterize agile project management, and which we'll be looking at in more detail shortly when we break down the Agile Manifesto in more detail.

But if you're just looking for a definition of agile project management now, rather than the backstory of what it used to be, here's a useful agile project management definition.

Agile project management is a collaborative, iterative project management approach that incorporates continuous testing and responsiveness to change.

Sound good? Let's circle back to the Agile Manifesto to learn more about the core values and principles you can use to guide any agile project.

The 4 core values of agile
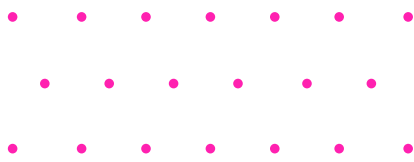
As mentioned above, the earliest agile project management methods focused on software, and the Agile Manifesto was created by software developers. So you'll see that word, and other related terms like "developers" and "customers", throughout.

But don't feel limited by that.

Whether you're creating software or something totally different (like a marketing campaign), there are lots of takeaways you can apply, no matter what industry you're working in.

The original Agile Manifesto declares that agile has 4 core values:

01.   Individuals and interactions over processes and tools.

02.   Working software over comprehensive documentation.

03.   Customer collaboration over contract negotiation.

04.   Responding to change over following a plan.

These core values are at the heart of all agile project management approaches, informing everything from standard ways of working to the 12 agile project management principles.

What becomes clear from the core values is that agile approaches are, above all, collaborative and people-driven.

That applies not only to the working processes (progress is made through "individuals and interactions" and "customer collaboration", putting the human element front and center), but also to the finished products. That is, the goal is to create something functional that delivers the most value to the end-user.

The 12 agile project management principles

According to the Agile Manifesto, there are 12 key principles of agile project management. In the manifesto's own words, they are:

01. The number one priority is customer satisfaction through the early and continuous delivery of valuable software.

02. Welcome changing developments, even late in development. Agile processes harness change for the customer's competitive advantage.

03. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.

04.   Business people and developers must work together daily throughout the project.

05.   Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

06.   The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.

07.   Working software is the primary measure of progress.

08.   Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.

09.   Continuous attention to technical excellence and good design enhances agility.

10.   Simplicity — the art of maximizing the amount of work not done — is essential.

11.   The best architectures, requirements, and designs emerge from self-organizing teams.

12.   At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

When it comes down to it, whether you're talking about actual software or using it as a metaphor for whatever you're creating (let's call it "The Thing"), agile methods encourage you to deliver iterations of "The Thing" quickly and often — because it's better for "The Thing" to exist in flawed reality than in perfect theory.

Another recurring theme in these principles? Get aligned, stay aligned, and work together. That goes for everyone involved: your own team, the "business people", other departments, and stakeholders. Agile project management methods rely on a highly collaborative process and strong interpersonal foundations. So as Bill and/or Ted once said: be excellent to each other.
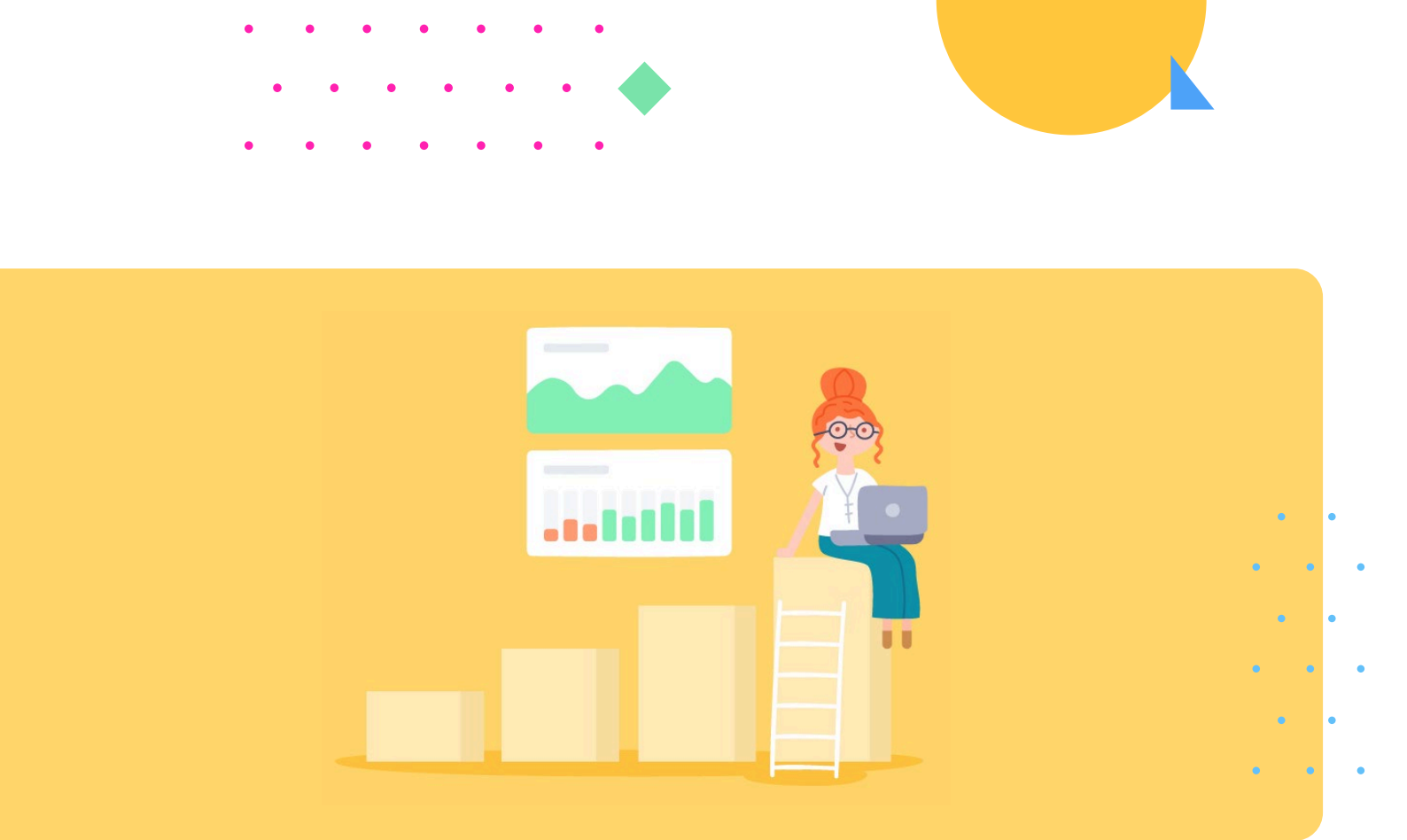
What are the benefits of agile project management?

Agile project management can seem like it's just a trendy project management methodology *du jour*, but it's proven itself to be more than just a flash in the pan.

That's because the results speak for themselves. Agile project management principles have allowed teams of all types to work more iteratively and flexibly, empowering them to adapt to their project's shifting requirements and deliver faster.

Here are some of the most commonly-reported benefits of agile project management.

More adaptability (and less risk)

One of the greatest benefits of agile methods is the ability to manage changing priorities. With agile's iterative approach and emphasis on continuous feedback, you can get the data you need during the development process, not after, allowing the team to make more impactful choices based on actual conditions, not just predicted conditions.

And with designated short sprint cycles, clearer project visibility, and regular reporting updates, teams can improve project predictability and reduce risk.

Greater customer satisfaction

You might remember that customer collaboration is one of the 4 core values of agile project management.

Well, one of the major benefits of this is that with greater customer collaboration comes greater customer satisfaction.

Agile project management methodologies foreground the customer and encourage you to work closely with them, as well as with other stakeholders, to ensure you're creating something that actually solves their problem.

And because agile projects incorporate regular testing and review with each sprint, you can get their real feedback, in real-time, with each iteration of your working product.

Happier teams

Agile teams are more autonomous. That is, they're often granted a freedom to suggest new ideas, innovate, and problem-solve that can be lacking in traditional project management methodologies.

With that kind of responsibility, people are trusted to get the job done and encouraged to see themselves as integral team members who can make a tangible difference to the project's bottom line.

Not only that, but the emphasis on collaboration and communication can help to foster more transparent, efficient, creative — and, yes, happier — teams.
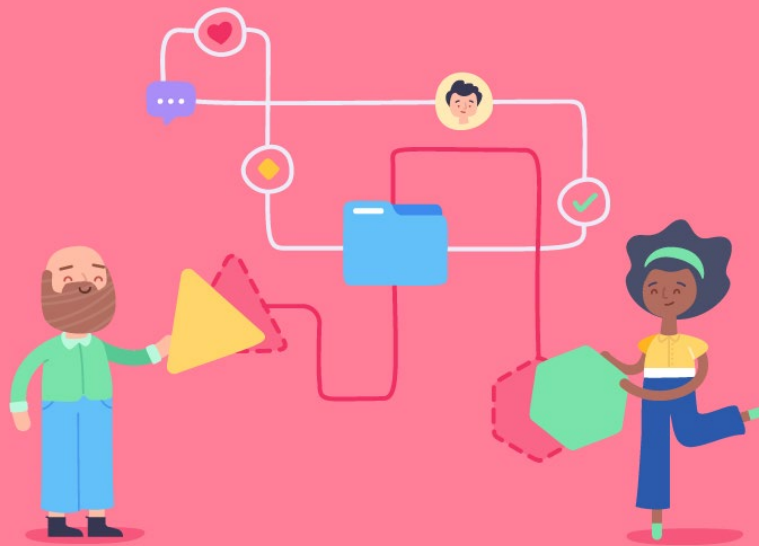
How to become agile

Higher-quality outputs, more satisfied customers and users, and improved team morale — it can sound too good to be true.

But here's the thing: agile project management isn't a magical cure-all that's going to solve all of your project management ailments. And it doesn't exist in a vacuum.

For agile methods to have this sort of transformative impact, you need support, buy-in, and some truly exceptional people on the team.

So if you're wondering how to become agile, here's what you need to bear in mind.

Get the right people on board

Agile project management methodologies rely on hiring great people and empowering them to do their best work. It's even outlined in the agile core values: people over processes.

That means that you need to focus on recruiting and hiring the right people first and foremost. Find the right people and free their talent to solve problems, not mindlessly follow orders, and you'll already be halfway there.

And get the right people on board

According to the 13th Annual State of Agile Report, the top three barriers to adopting or scaling agile project management practices are all rooted in organizational culture issues. They are:

01. Organizational culture at odds with agile values

02. General organization resistance to change

03. Inadequate management support and sponsorship

For agile to work, you need to get buy-in and commitment from everyone — including leadership. Survey respondents praised internal agile coaches, executive sponsorship, company-provided training programs, consistent practices and processes across teams, and implementation of a common tool across teams as the top 5 tips when it came to rolling out agile project management methods across the company.

Get a certification

There's a common misconception that agile is just an "anything goes" free-for-all — but that's absolutely not the case. Agile isn't the absence of methodology; it's a type of framework in itself.

If you're committed to agile project management, you can always invest in getting an agile project management certification to learn more about the agile values and principles and get a great insight into how they can work for your team.

Use the right project management tools

Not only is the implementation of a common tool across teams one of the top 5 ways to scale your agile practices, it's also essential for helping your team to become agile in the first place.

Look for a flexible agile project management tool that supports your way of working, rather than dictating it. Teamwork has everything you need to give everyone on your team the visibility, flexibility, and collaboration they need to keep work moving forward, whether you favor Scrum or kanban boards — and when it's time to scale, it can scale right along with you.

Agile vs Scrum: What's the difference?

We've already mentioned how many types of agile project management there are (answer: *just so many*), but of those many agile methodologies, there's one, in particular, you might want to brush up on.

Scrum is undoubtedly one of the most popular agile methodologies used today, with a whopping 72% of respondents to the most recent State of Agile Report saying they use "Scrum or a hybrid that includes Scrum".

Like other agile project management methodologies, Scrum abides by the main agile values and principles (iterations, responsiveness to change, all that good stuff discussed above).

However, there are a few Scrum-specific terms and processes you need to know if you're thinking about implementing agile project management with Scrum.

Agile project management with Scrum

There are three main roles on a Scrum team:

Product Owner

The person responsible for maximizing the value of the work completed by the Development Team. One way they do this is by managing the Backlog.

Development Team

A small group of people who are ultimately working on The Thing. The team has a flat hierarchy and it's self-organizing; once the goals are set, team members are free to tackle them however they choose.

Scrum Master

Works to facilitate and support the Scrum process across the Product Owner, the Development Team, and importantly, the organization at large.

Here's a rough overview of how it works:

01. Everything that the team needs to do (for example, everything that's needed in a product) is listed out in a Backlog and ranked in order of priority by the Product Owner. The Product Owner's job is to optimize the Development Team's work by ensuring the Backlog is the best Backlog it can be (i.e. clear, accessible and organized for success).

02. Scrum uses sprints of a fixed duration (usually a few weeks, always less than a month). Each sprint has a predefined Sprint Goal. Items from the Backlog are identified and worked on as part of each Sprint.

03. Before a Sprint can happen, you need to do some Sprint Planning to figure out what your Sprint Goal will be and how you're going to accomplish it.

04. Once the Sprint is underway, the Development Team has a short daily standup — called a Daily Scrum — to report on the previous day's progress, what they'll be focusing on today, and any risks they've identified.

05. At the end of each Sprint, the team holds a Sprint Review (sort of like a Sprint-specific post-mortem meeting) to assess their performance and inform the next round of Sprint Planning.

06. Iterate, iterate, iterate.
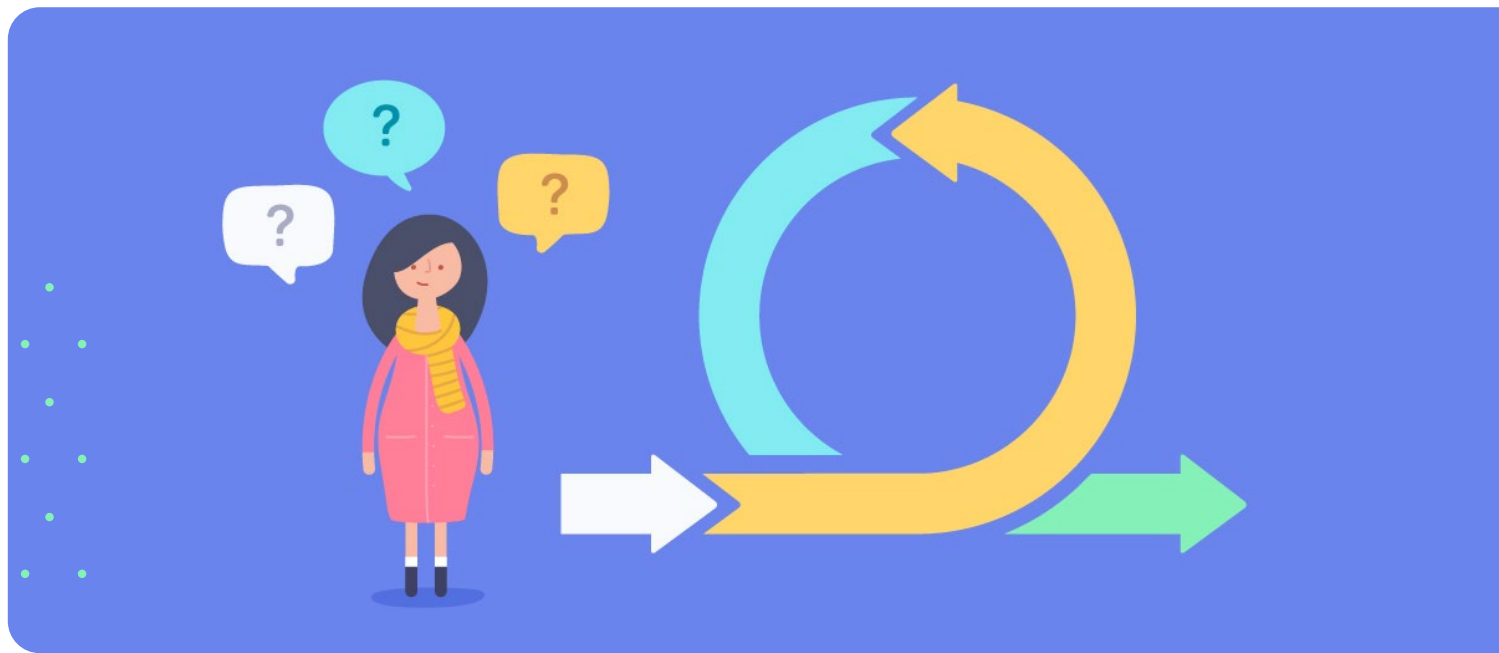
Which agile methodology is right for me?

If you're still trying to decide which methodology you should go with — agile vs Scrum vs Kanban vs Scrum vs some other hybrid? — remember that you can start by borrowing the principles and processes that make sense for you and your team.

Section

06

The 6 project management skills you need to have

Being a truly great project manager is about more than just training and qualifications. These are the 6 skills you need to get your projects over the line — and what you can do to develop them.

teamwork.

What does it mean to be a great project manager?

It's not about qualifications or degrees (but those are good too, of course).

It's not even about simply delivering on the classic duties and responsibilities of a project manager (although obviously that's a pretty big part of it).

Those things are important. But being a really great project manager isn't just about tasks, timings, and technical prowess.

In fact, some of the most important project manager skills — the ones that will help your project team to feel valued, motivated, and trusted — are the soft skills.

The soft skills of project management are what allow you to get the best out of people, create harmonious relationships across departments, and keep things running smoothly throughout the process.

They're the skills you rely on when things start to get scary, when the project subtly begins to change direction, or when you need to give tough feedback to your team.

While the term "soft skills" makes them sound fluffy (or squishy, or mushy), the impact they have on your team's performance is rock-solid — and 80% of project management professionals agree. According to the Project Management Institute's 2018 Pulse of the Profession report, four out of five respondents believe that soft skills are more important today than they were just five years ago.

Here's our rundown of the 6 most important project management skills — and how to develop them into your project management strengths.
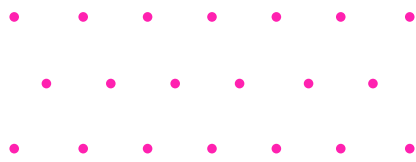
Project management skill #1: Communication

As a project manager, you need to work with a lot of different people: team members, other departments, leadership, clients... Most projects have a long list of stakeholders that you need to keep aligned, up-to-date, and ideally, happy.

When you have so many people to manage, communication is key. For work to flow, you need to make sure that everyone is on the same page, working towards the same business and company goals, and all kept in the loop about any changes or issues. But that's easier said than done, especially when your job is to liaise with people at all different levels — meaning that you need to be able to consistently tailor your communication style and content to the right audience.

And no pressure, but for a project manager, poor communication can derail everything. The PMI's 2018 Pulse of the Profession report found that it was a primary factor in 29% of failed projects.

So considering it's a skill you'll rely on multiple times a day, every single day, in lots of varied formats (face to face, email, instant messaging, video conferencing — the list goes on), it seems pretty safe to say that the importance of people skills to project management success can't be ignored.

How to develop this project management skill:

Listen (and ask questions). Whether you're in a client meeting or an employee one-to-one, simply listening is one of the most powerful things you can do. Do it right — and ask the right questions — and you'll be able to pick up on what's not being said as well as what is. And with a better understanding of the situations at hand, and how the team is feeling about the work they're doing, you're better positioned to problem-solve when the need arises.

Don't shy away from giving feedback. Even when it's critical, feedback is essential for growth — and everybody wants it. In most people's minds, feedback is linked to career development. And one study found that 94% of people believe that corrective (i.e. "negative") feedback improves their performance, so long as it's presented well. That means your feedback should be specific and action-based, with a clear path for what to do better next time.

Centralize your communications. With so many different ways to communicate, it can be easy to feel like you're constantly crossing your wires or losing visibility of important information. Using a project management tool can help by giving you one central place for all of your important discussions and updates, at both the task level and project level. This means that every instance of communication has more purpose, context, and traceability, as well as allowing you to send fewer emails and keep your focus where it matters: on the work.
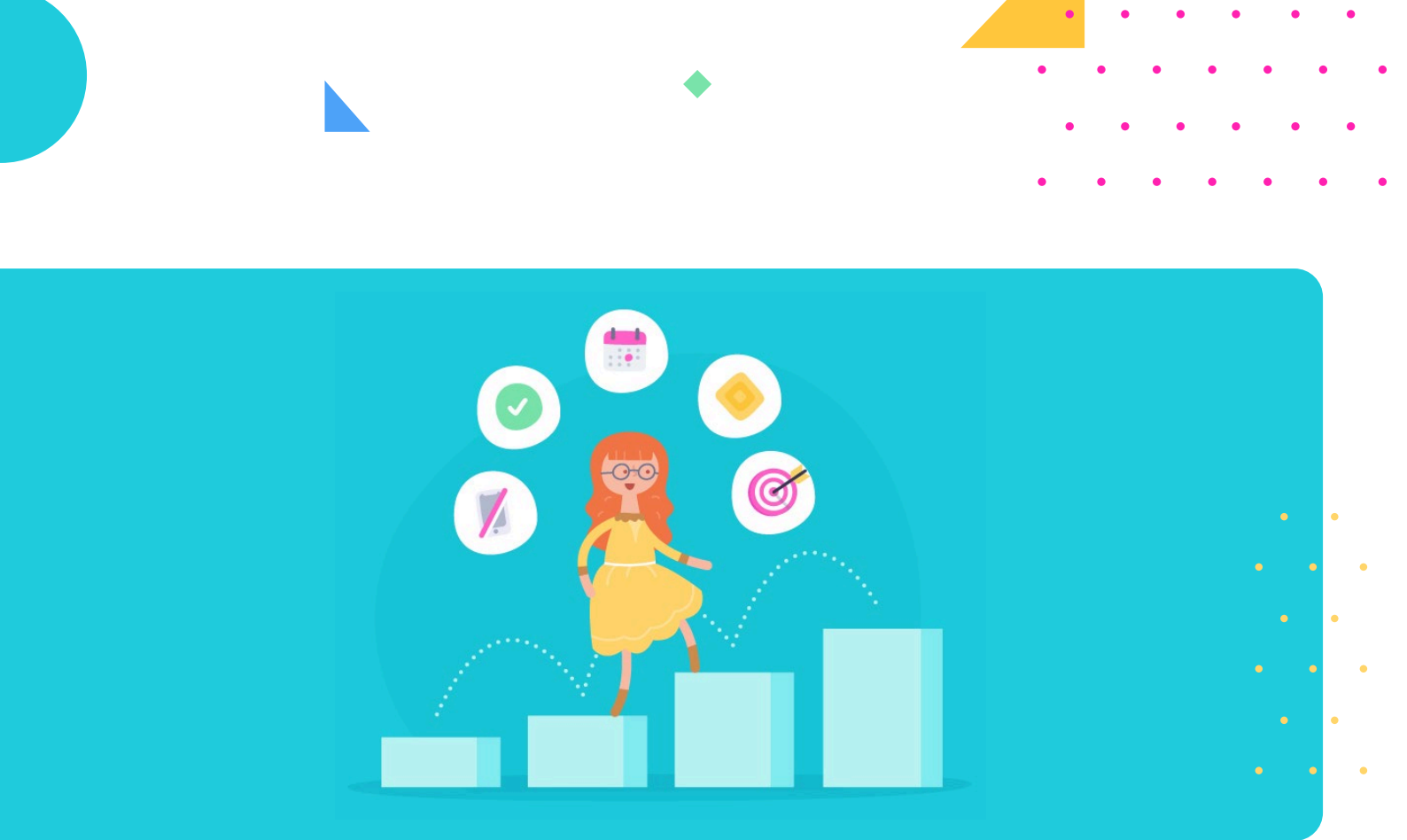
Project management skill #2: Organization

We hate to be a cliché, but there's no getting around it: organization is one of the most important skills needed to be a project manager.

But while it may be the most typical project management skill on this list, the good news is that it's also one of the most tangible — and therefore one of the skills easiest to practice and develop.

Organization is a broad term that covers a lot of associated subskills, from the big picture stuff like planning out the project in detail, to the everyday things like personal time management that allow you to get your day-to-day work done and be in the right place at the right time.

And as a project manager, you're not just responsible for keeping yourself organized and managing your own work — everyone else is relying on you, too. So it's easy to see why organization is one of the most important strengths of a project manager.

How to develop this project management skill:

Keep your calendar up to date. Having a [shared calendar](#) helps the whole team to keep track of the important tasks and milestones so you never lose sight of when things are due. Not only that, but it also makes it easier to know when people are available so you can schedule meetings with less fuss. And when it comes to things like annual leave, it even helps you to spot any potential [resourcing issues](#) before they become problems. Try creating a [filtered calendar](#) for your project team (or subteams within your project team) to make it even easier.

Don't be afraid to set your DND status. That's [Do Not Disturb](#). Part of being organized means focusing on one thing at a time — which also means giving each individual task your full attention, rather than trying to spread your attention across several things at once (and succeeding at none of them). So when you're in a meeting, or if you need some deep focus time, turn off the notifications and make some space for yourself to think.

Project management skill #3: Adaptability

So you know that beautiful, detailed, well thought-out plan that you made with all your sharply-honed organizational skills? Yeah, that's almost definitely going to change.

You know what they say about the best-laid plans of mice and project managers: they often go awry.

That can be for reasons outside of your control, like client or stakeholder demands, or because in the course of the project, you realized you needed to change direction in order to get the best outcome.

The best project managers aren't afraid to go off-piste, because one of the keys to successful project management is being adaptable. For project leaders, it's one of the most important project management skills, allowing you to flexibly respond to change in the moment, without sacrificing your whole project plan and having to start from scratch all over again.

And if you can't do that? According to the same PMI survey quoted above, a change in the project's objectives is responsible for 37% of project failures, while a change in the organization's priorities comes in as the #1 reason projects fail, with 39% of the votes.

Now, we're not saying that being adaptable is going to magically make all of that disappear — but it does mean you're better equipped to handle it, minimize the fallout, and steer the project back on track to the desired outcome.

How to develop this project management skill:

Be a little more agile. No matter which project management methodology you like to use, understanding the basics of agile is a good project management skill to have in your toolkit. Even if you don't want to go fully agile, there are lots of agile marketing and project management practices you can start to incorporate, like daily standups, iterative sprints, or more continuous feedback. Or maybe just get inspired by the core values and principles and see if there are any you can ~~steal~~ adapt for your own team.

Project management skill #4: Empathy

As a wise person once said, "the importance of people skills to project management success can't be ignored". (That person was me, a few paragraphs ago.)

But perhaps the most important of all the people skills? Empathy.

Empathy is the ability to understand how others around you might be feeling and see things from their perspective.

As a project manager, empathy empowers you to engage with everyone you work with more compassionately and productively.
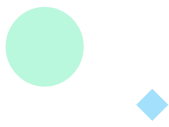
In turn, that helps you to be a more insightful leader and create a more motivational, rewarding business environment for your team. Because you're better positioned to understand what drives each individual, you're also better equipped to help them develop their skills and reach their goals.

Empathy is also an important part of the project manager skill set when it comes to conflict resolution. Particularly when used alongside those excellent communication skills you've been working on, empathy will make you a better mediator, and can help your team members to feel more respected and valued.

How to develop this project management skill:

Check in with your team. Try to connect with the people working on your project. This circles back to the skills we talked about with communication, like asking questions and listening to the answers, but it goes a step further: as you do all of that, you need to make a conscious effort to see things from the other person's point of view. Developing that personal connection with individual team members will help you to understand how they see things, become familiar with their individual communication styles, and more.

Read more fiction. Studies have found that reading literary fiction exposes us to complicated characters and scenarios we otherwise might not experience in our own lives. And as we start to identify with the characters and become emotionally involved, we begin to consider their viewpoints, goals, and desires — not just our own.
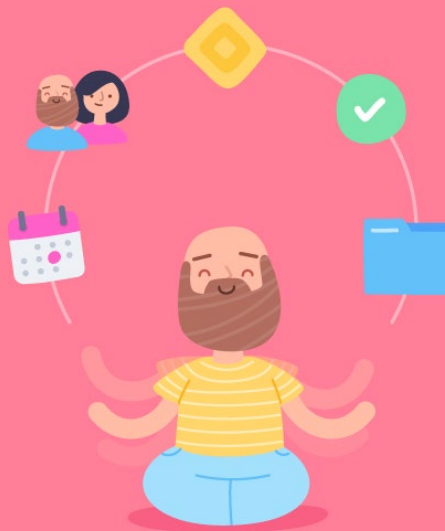
# Project manager skill #5: Unflappability (i.e. the ability to stay cool under pressure)

Great project managers are like broken wings: unflappable. They cannot be flapped.

Or to put it another way: they're able to stay cool under pressure.

That's important because as a project manager, you'll find yourself in a lot of high-pressure situations.

Deadlines closing in, difficult client conversations, things not going to plan — project managers don't just need to survive the chaos, they need to be able to thrive in it.
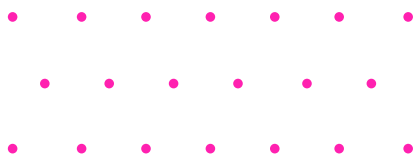
Particularly in an agency environment, where things are fast-paced and constantly changing, project managers need to be able to keep a level head and make good judgement calls under pressure.

But whether you're client-facing or not, if you want to be a great project manager, you need to be able to think on your feet, come up with creative solutions, and keep the team feeling positive, not panicked.

How to develop this project management skill:

Know what flaps you. If you want to be unflappable, you need to start by understanding what your stress triggers are. Maybe you're unfazed by deadlines, but you find it hard to say no to people in the moment. Understanding your personal pressure points will help you to be more aware of them going forward, so you can plan ahead and make better decisions.

Learn from your experiences. You're only human, so no matter how calm and collected you try to be, you're probably going to get a little frazzled from time to time. Use it to your advantage and do a run-down of what happened after the fact. (Like a post-mortem meeting, but for your brain.) Once you're out of the situation, make a point to reflect on how you responded by recording your answers to the following:

- What was the situation?

- Why did it happen?

- How did you react to it? Why did you react that way?

- What do you think you could have done better?

- What would you do differently next time?

Keep track of what causes you to get flustered and try to see if you can chart any patterns over time.
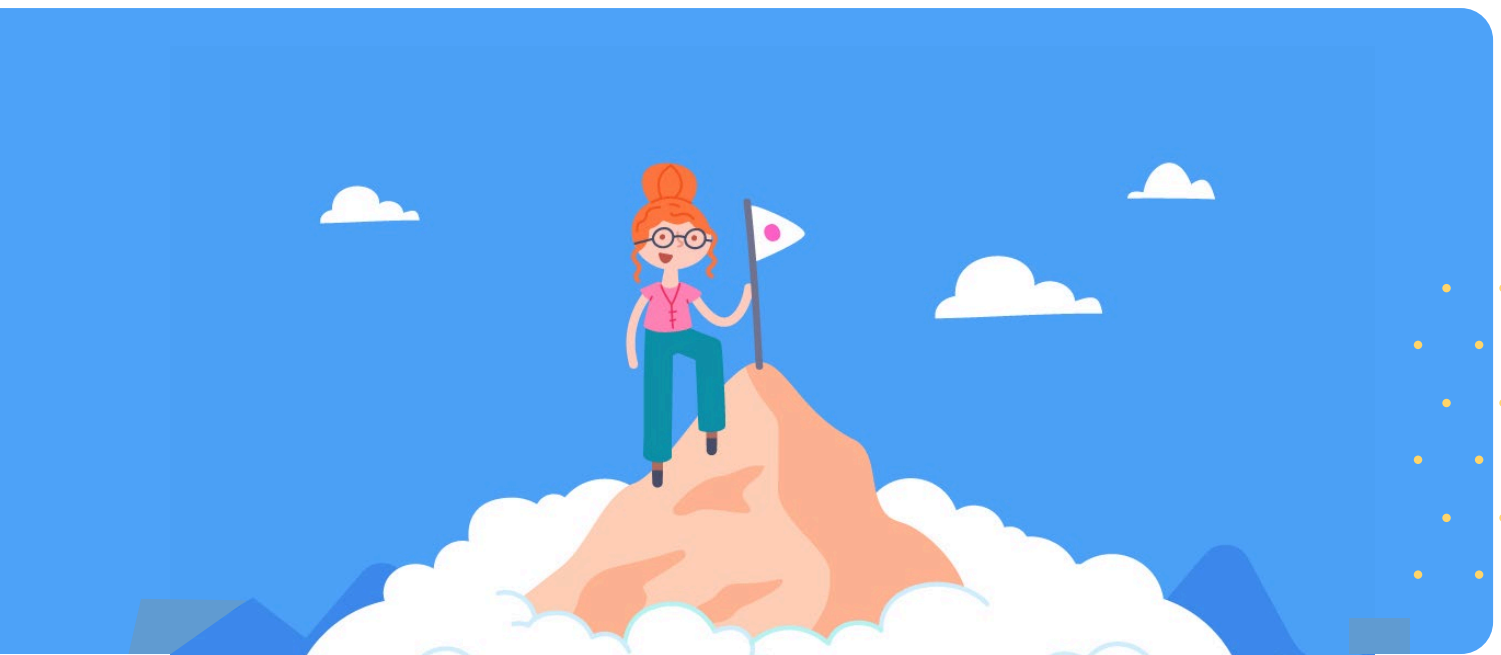
Project manager skill #6: Leadership

Is there anything more vague and less quantifiable than being told to "be a good leader"?

The thing is, great leadership will look different to different people. What it means to be a good leader can vary depending on industry, team, and individual team members.

And it's not just one individual trait. To be a good leader, you need to incorporate many of the other project management skills on this list. You need to be able to communicate the project goal clearly, relate to your team with empathy, and steer the project through rocky patches — but you also need that extra je ne sais quoi, that spark of something that can ignite inspiration in the rest of the team.

That's leadership. And it's a key factor in the project management skills matrix.

It's also something that grows as you develop your project management experience. So when we say that leadership is one of the key project management skills, we don't mean that you need to be one particular way.

Instead, we believe that being a good leader means being able to understand what's needed to motivate and drive your team, in your own way, using your own unique project manager skills and competencies.

How to develop this project management skill:

Learn from other leaders. Who inspires you and why? Try to learn as much as you can from leaders you admire — whether that means going for coffee with a colleague or mentor, or reading up on a famous leader you want to emulate. Not sure where to start? Here are 10 ways leaders can help their teams to do better.
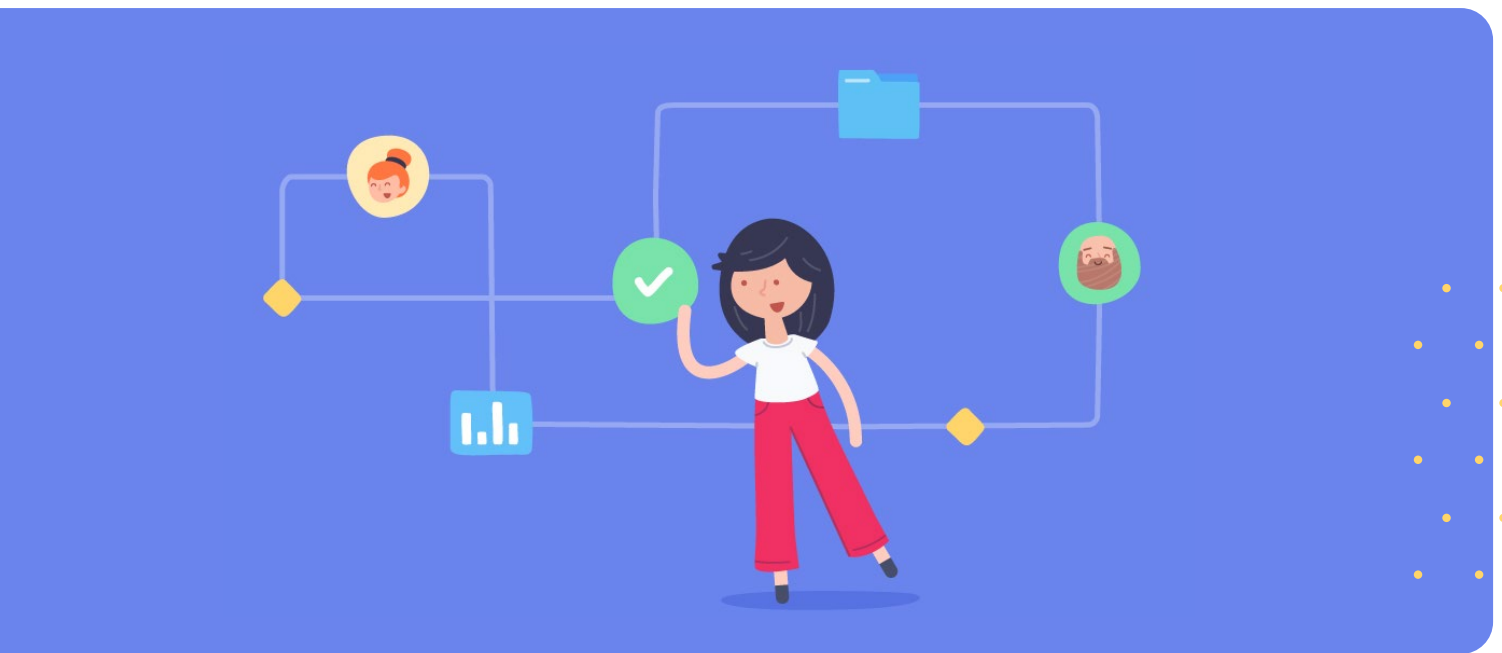
How to develop project management skills

The best way to learn these project management skills is by practising them every day.

As with most things, once you know the areas you want to improve, you can seek out opportunities to develop them.

Volunteer to give a presentation to challenge your communication skills; start tracking your work in a [project management tool](#) to ensure you're always organized and on top of things; and look for ways to engage and inspire each team member.

Start honing your soft skills, and you'll soon find that they become your project management strengths.

Section
07

What is a project stakeholder?

Who are your project's stakeholders, and how can you work with them to ensure better outcomes for your project? Here's why project stakeholders are so important.

teamwork.

No project manager is an island.

A project is a collaborative effort. Even though you're in charge of managing it, in order for the project to be successful you still need to rely on, work with, and report back to other people.

Throughout this guide, we've been talking a lot about the various people involved in taking a project from idea to execution: your team, other departments within the organization, leadership, clients, and more.

These people are your **project's stakeholders**. But what does that mean, exactly? How do your stakeholders affect your project? And what can you do to keep them happy?

What is the definition of a project stakeholder?

According to the Project Management Institute, project stakeholders are defined as:

"Individuals and organizations who are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or successful project completion."

In other words, your project's stakeholders are the people or groups who have something to gain (or lose) from your project's outcome.
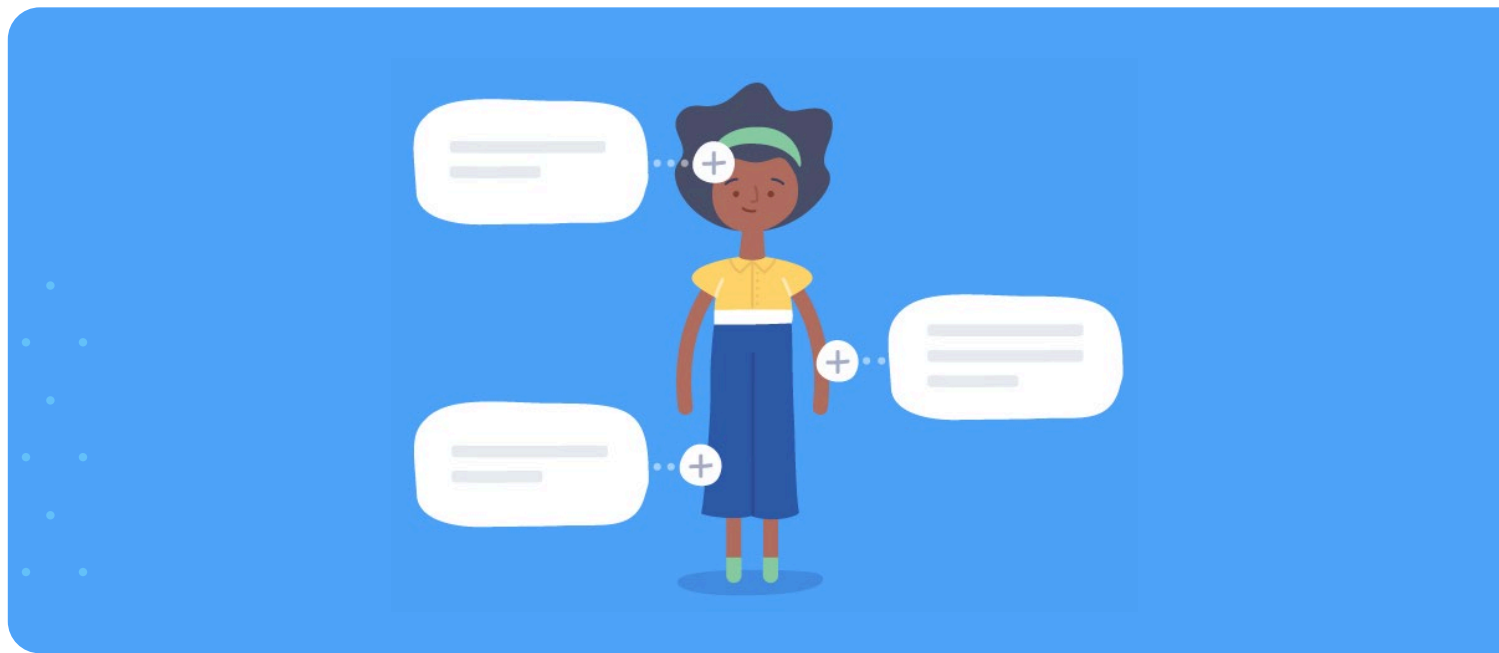
Okay but really: what is a stakeholder in project management?

So according to the project stakeholder definition above, a stakeholder is anyone with an interest or investment in your project. But what does that actually look like in practice?

Your stakeholders are a varied group, with varied interests. (If you're playing on Hard Mode, they might even have completely conflicting interests that you need to balance — fun!)

Not only that, but the list of stakeholders can change throughout the project's journey: a certain stakeholder's influence might become more or less important depending on the project phase, for example.

Your job as a project manager is to keep all stakeholders informed, involved, and on-board throughout the project's progression. Stakeholder happiness is one of the key metrics of a successful project, so making sure you get the right buy-in and tick the right boxes — at the right times — is crucial.

Ultimately, managing those complex stakeholder relationships is one of the key skills of a project manager. But with so many different interests, perspectives, and personalities to juggle, it's no easy feat.

Here's what you need to know about your stakeholders: who they are, what they do, why they matter, and how to work with them.
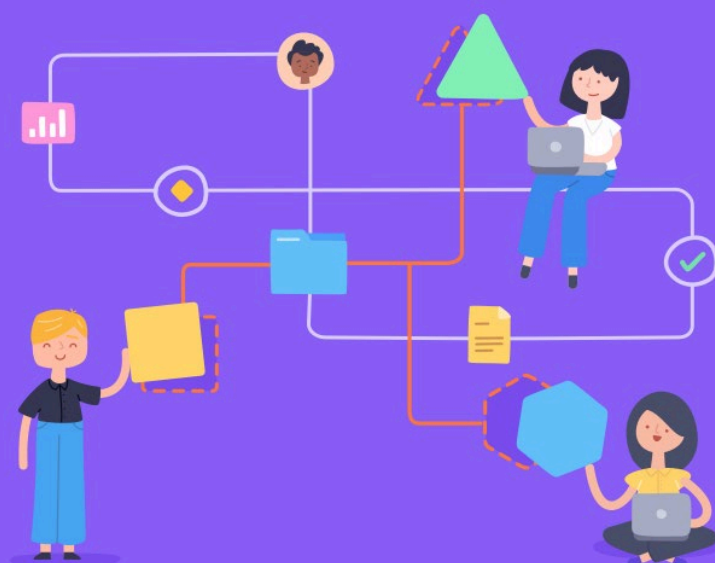
OK, but really: What is a stakeholder in project management?

Now that you know the answer to the question "what are project stakeholders", the natural next question is "who are the stakeholders in a project".

As we've already seen in the project stakeholder definition above, a stakeholder is anyone with an interest or investment in your project. But when you actually start to map that out, you might be surprised by how long the list can be.

That's because investment in your project can take a number of different forms. It can be the company's money, an executive's sponsorship or a manager's resources. It can also apply to the end user or customer, as their needs are a critical consideration when it comes to steering your project.

Let's take a closer look at some of the different kinds of stakeholders in a project.

Types of stakeholders in project management

There are two main types of stakeholders in project management, internal and external.

Internal stakeholders

These stakeholders are coming from within the house!!! Internal stakeholders are people or groups **within** the business, such as team members, managers, executives, and so on.

External stakeholders

External stakeholders are — as you can probably guess — people or groups **outside** the business. This includes customers, users, suppliers, and investors.

As you can see, stakeholders don't always work for the project manager. Needless to say, this can add an extra layer of complexity, as you need to be able to communicate with people at all different levels of the business and with varying degrees of engagement, influence, and interest.

Examples of stakeholders in a project

The stakeholders in each particular project will vary depending on the type of project and industry, but here are a few examples of the types of stakeholders in project management you might need to consider:

- Project manager
- Team members
- Managers
- Resource managers
- Executives
- Senior management
- Company owners
- Investors

- Sponsors
- Financiers (the people, not the cakes)
- Suppliers
- Vendors
- Consultants
- Customers
- End users

So how do you know which stakeholders you need to focus on for your particular project? For that, you need to do a stakeholder analysis.
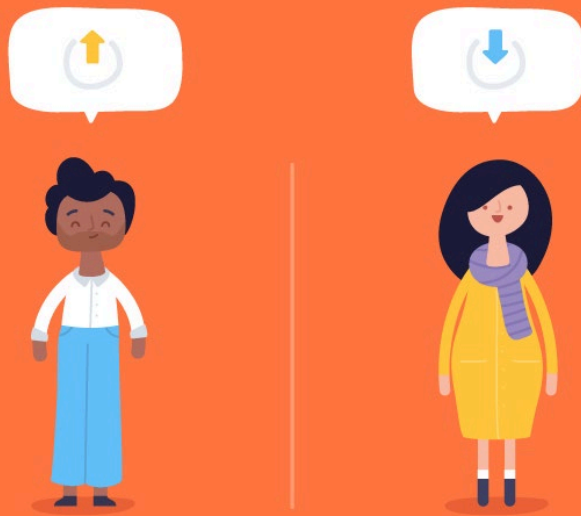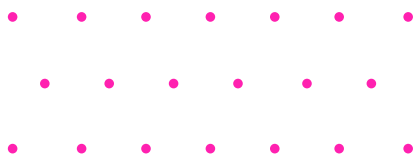
How to do a stakeholder analysis

As soon as your project charter is complete and the scope of your project is defined, you can use it to start mapping out your stakeholders. Here's how to get the ball rolling with a basic stakeholder analysis process.

1. Identify your stakeholders

First step, you need to identify who your stakeholders actually are. To do this, draw on your project charter and any other project plans and documentation to compile a full list of your project stakeholders, both internal and external.

Bear in mind that some stakeholders won't come into play until later in the project lifecycle — but if you can anticipate who they'll be in advance, you can start to get their buy-in, build the relationship from the outset, and help them to feel involved from the beginning.

2. Prioritize your stakeholders

Once you've identified all of your stakeholders, you can start to prioritize them.

Prioritizing your stakeholders is important because it helps you understand where to invest your resources. In other words, it helps you — as the project manager — to identify who the key decision makers are at any given moment, so you can ensure that you're talking to the right people, at the right time.

There are a few methods of doing this stakeholder prioritization, but one simple way is to plot them out using a power/interest (or power/influence, or impact/influence) grid.

The power/interest grid helps you to identify your key stakeholders by answering two key questions that help you to group them into one of four categories:

- **What level of power do they have?:** How important is it that they're happy with the project's progress and results? How integral are they to the project's success? How influential are they to the project, to other stakeholders, to the team, and so on? (Remember: a stakeholder's influence can be positive or negative!)

- **What level of interest do they have?:** Is this project super important to them, or are they only tangentially connected to it? Is it something they're directly accountable for? Are they reliant on it for other work or results? Are they opposed to the project or concerned about it in some way?

Power-Interest Grid
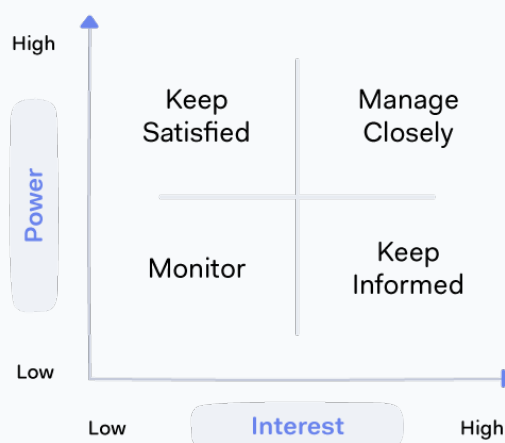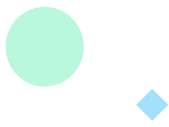
As we can see from the (highly technologically-advanced) matrix above, stakeholders who fall into the top-right quadrant (powerful + interested) are the ones you should be giving extra attention to, because they're the ones who can have the most impact on your project — for better or for worse.

3. Understand your stakeholders

Now that you know who the key players are and which ones to prioritize, you need to get a full grasp of their expectations for the project.

For key stakeholders, this might involve meeting up for a short face-to-face interview or conversation where you discuss things like:

- What their definition of project success looks like

- Any concerns or reservations they have about the project or its outcomes

- What their expectations for the project are

- What impact a positive or negative project outcome would have on them

- Whether there are any anticipated conflicts of interest with other stakeholders that you need to be aware of

Not only will these conversations help you to understand each stakeholder's involvement in, and outlook on, the project, but it also helps you to build a bigger picture of your stakeholder network and how each stakeholder interrelates.

And on a personal level, meeting with the key stakeholders at the beginning of the project helps you to feel out some basic interpersonal preferences (like communication style), as well as start building your relationships with each stakeholder.

As you're doing this, it's also helpful to keep your eyes open for any political, cultural, or environmental cues, if you can. Picking up on things like the political climate of the organization, how your key stakeholders interact with each other, and any potential conflicts of interest can help to give you some essential context when it comes to running your project or pre-empting certain decisions — and it's a project manager superpower that you should start cultivating as soon as possible.

How to manage your project stakeholders

Identifying your stakeholders and their needs is just one piece of the stakeholder management puzzle. But it doesn't end there. For a successful project, your key stakeholders' requirements, objectives, and happiness should be an ongoing concern throughout your project.

Now, that doesn't mean that the stakeholder is always right — and your job as a project manager will sometimes involve pushing back on your stakeholders and re-balancing their expectations with the project charter and project plan you all agreed on at the start.

The tricky part is in balancing everyone's needs, requirements and objectives so you can keep your stakeholders happy — while also delivering the project you set out to deliver.

Here are a few ways you can establish some best practices for stakeholder management and develop better stakeholder relationships at every phase of your project.

Document each stakeholder's roles and needs

All that work you did identifying your stakeholders and their individual needs in relation to your project? Put it to good use by compiling it into a shared, accessible document to make sure you have a record of everyone's role and responsibilities and keep you all on the same page.

Creating a stakeholder register for your project helps you to keep track of a long list of people and priorities. With a definitive document you can update, edit, and consult as your project progresses, you can ensure that you're always driving the project in the right direction and keeping the right people informed at the right times.

And speaking of which…

Communicate with your stakeholders

As a project manager, keeping your stakeholders informed, included, and inspired throughout the lifecycle of your project is one of your most important jobs.

As mentioned above, your "priority" stakeholders will probably shift depending on which phase of your project you're at. That's a good thing, allowing you to direct your energy where it's needed and avoid overloading people with irrelevant information.

That's important, because while you want to give your stakeholders visibility, over-communication can be just as frustrating as under-communication.

Using a project management tool with lots of different communication options means that you can tailor your notifications to each stakeholder's unique needs, while still keeping a full audit history of every action and decision (which is especially handy when it comes to reporting time).

Give project stakeholders visibility over what matters to them

Help each stakeholder to cut through the noise and get immediate insights into the metrics that are most important to them by creating custom Dashboards. Build personalized Dashboards with panels to keep track of things like tasks, project statuses, team activity, milestones, risks, and more, so your stakeholders can quickly see how certain parts of the project are progressing and get an immediate overview of the information they care about at a glance.

Stakeholders shouldn't be an afterthought. Instead, build them into your project from the beginning, by communicating regularly, keeping them up-to-date and involved, and ensuring they feel valued and listened.

Section

08

What is a project charter and why do I need one?

Do you really need a project charter? Learn what a project charter is for, why it matters, and how to write one that people actually want to read.

teamwork.
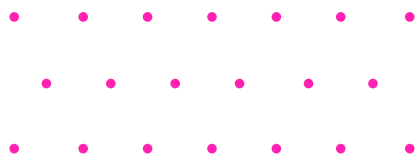
What is a project charter in project management?

A project charter is a short document that sets out the core details of the project's purpose and aims. It's created in line with the business case for the project as described by the project sponsor (i.e. the person who's responsible for the project's existence in the first place), and it's a crucial part of the initiation process at the start of the project.

Ultimately, your project charter documents the goals, objectives, and business case for the work.

Once created, the project charter serves as a sort of contract between the project sponsor and the project manager, giving a top-level overview of the expectations and authorizing the project manager to mobilize resources to achieve the right outcomes.

Whoa, does that sound overly complex? Don't worry — we've got you.
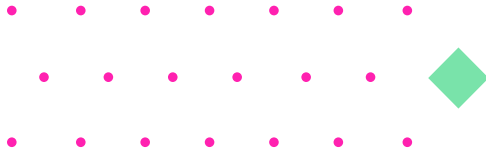
A really simple project charter definition

A project charter is a formal document that outlines the business objective of your project and, once approved, initiates the project.

What is the purpose of a project charter in project management?

As mentioned above, your project charter serves three main functions:

01.   It defines the goals, objectives, and basic purpose of the work (all of which will ultimately feed into your project plan).

02.   It creates a shared understanding of the project's goals, objectives, and resourcing requirements, before you start scoping these out further and in more depth.

03.   It allows you to present all of the above to the project stakeholders in order to get buy-in, investment, and authorization to go ahead

But it's not just used in the initiation phase: your project charter is something you can return to throughout the lifecycle of your project to make sure your work is aligning with the key goals and objectives you set out to accomplish in agreement with the project sponsor and/or key stakeholders.

Why is a project charter important?

As well as fulfilling those main functions, there are a few other benefits to having a project charter.

It makes the project's purpose crystal clear?

Because a project charter explicitly lays out the business case for the project, it means that everyone knows how the project contributes to the company's big picture strategic goals. It ensures that your project isn't just ticking arbitrary boxes, but is actually doing something that will impact the business's overall objectives.

It helps you to identify your stakeholders

The project charter plays a really important role in formulating your project management plan overall, but one of the areas where it's especially useful is in helping you to identify key project stakeholders — early.

As soon as your project charter has been completed, you can start to do your stakeholder analysis, which means that you can start to involve key stakeholders in tandem with creating your project plan.

It bestows authority to the project manager

Okay, okay, "bestowing" anything can start to sound a little medieval. But whether you bestow, bequeath, endow, or grant it, your project charter officially gives your project manager authority over the project. This means that they have the power to plan and control the project, and it establishes their role to the rest of the project team and stakeholders.

It's your north star

Okay, we kind of alluded to this already, but it's worth repeating. While your project plan is great for seeing if you're on track with tasks and timings, sometimes all those minute details can be more of a distraction.

Your project charter, on the other hand, is the absolute essence of your project. So if you're ever unsure whether something is steering you in the right direction or taking you off track, your project charter helps you and your team to cut through the noise and reevaluate whether the work you're doing aligns with your ultimate objectives.
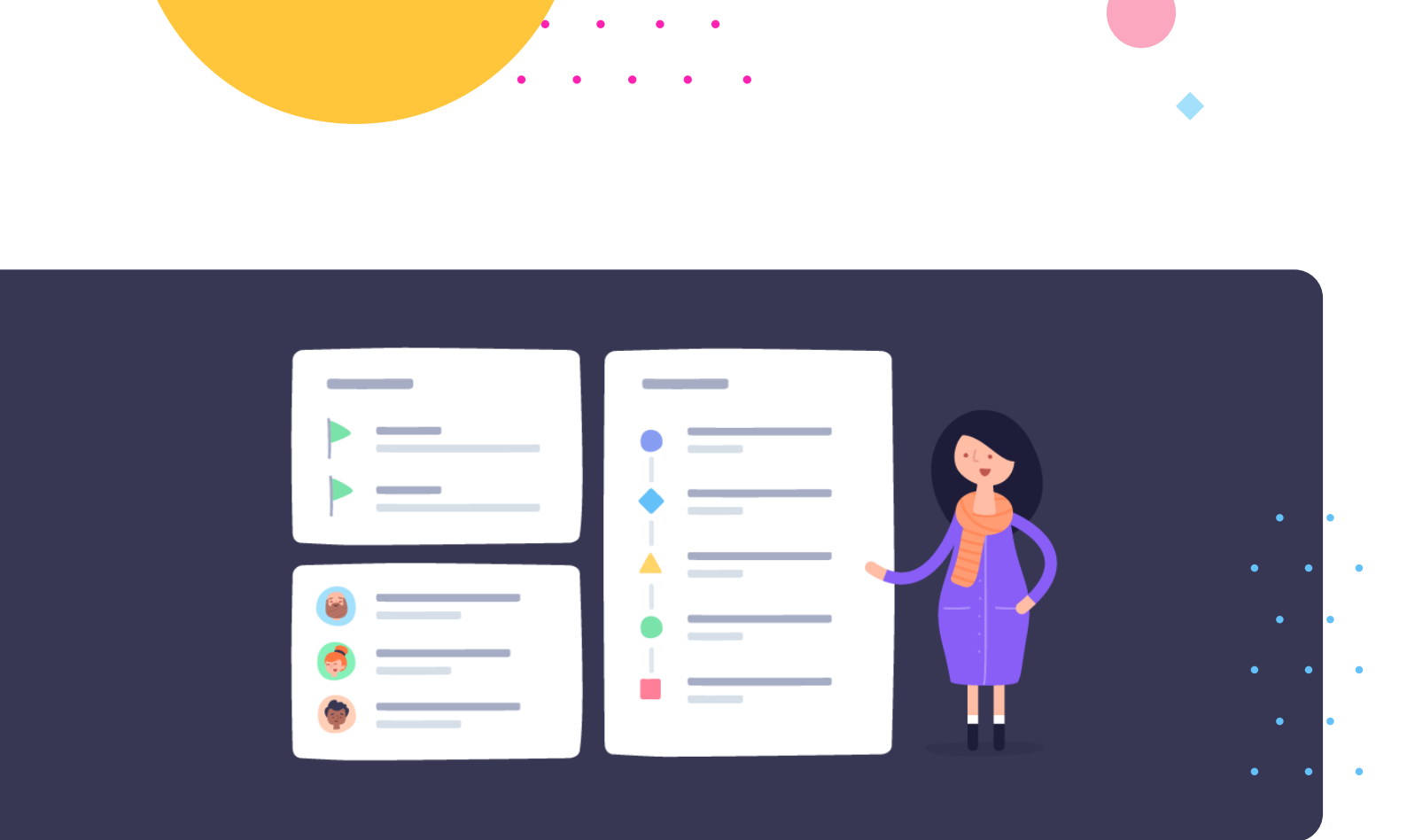
What is included in a project charter?

So what actually goes into the project charter?

Your project charter is a high-level overview, but it can still cover a lot of ground. Here are some project charter elements you should consider including in your project charter document:

Your project's purpose. Why are you doing it? What are the aims and objectives? Try to sum it up in one concise goal statement. And make it specific! Compare the following:

- **A bad goal statement:**
  "We want this project to increase revenue."

- **A better goal statement:** "This project aims to deliver a new product to X market in Y time to increase our revenue by Z% within 2 years."
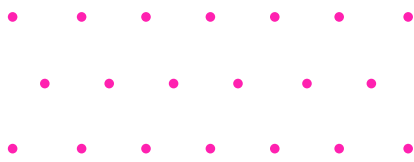
Make sure you're clear about what you're doing and why, because the right goal statement can set the tone for everything else. (No pressure!)

What success looks like. What are you hoping to achieve with this project? This is a good time to start thinking about measurable KPIs so you can create a project plan that tangibly delivers on your success criteria.

The key players. You might not know every single person who's involved yet, but you should know enough to get you started: project sponsor, project manager, and any other key stakeholders. This is a good time to list them out, as well as their specific roles within the project.

Risks you've identified. Again, you'll discover more of these as you flesh out your project plan, but this is a good place to acknowledge any top-level risks that you already know about from the outset.

Key deliverables. What is it that you actually need to deliver as part of this project?

High-level overview of resources (budget and people power). If there are already any pre-approved resources allocated to this project, make a note of them in your project charter so you know what you're working with.

A top-level summary schedule. You can delve into the nitty-gritty later, but it's useful to outline a basic timeframe for your project, as well as plot out any key milestones along the way. (This can be in the abstract for the project charter, e.g. Month 1, Month 2, and can get more specific when it comes to the project plan with scheduling software.)

Remember, the goal here isn't to go deep on any of the above; you can do that in the project plan. Instead, your aim is to cover enough ground to align all key stakeholders and get everyone onto the same page about the purpose, scope, and breadth of the project, so they can embark on the project with confidence.
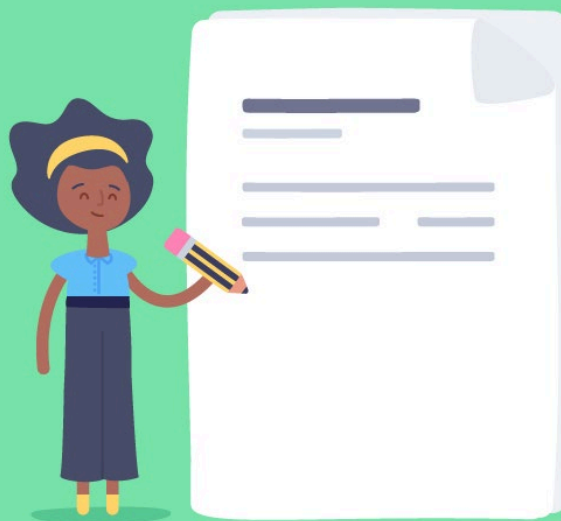
How do you write a project charter?

Now for the actual writing of the project charter. Regardless of which elements you decide to include or exclude from the above list, here are some general tips to bear in mind as you write it

Get familiar with how your organization does it

Make the most of any existing organizational process assets that you have at your disposal. Are there previous project charter examples you can draw on? Does your department have a project charter template?

Examples and templates can really help you to get a sense of how things are done — and what's important to your organization — so you can follow suit and start off on the right foot.

Write it in basic, easy-to-understand language

When you're writing your project charter and making a case for the importance of your project, it can be tempting to use fancy words and complicated terminology to make things sound more impressive. But really, the simpler the language, the better — especially when it comes to your project charter.

Brush off the fluff. Cut the wild claims that don't really mean anything or apply to your project. ("This project will increase synergy and allow us to leverage it for maximum impact"… sorry, what?) Say it like it is, without jargon, so that anyone can read your project charter, understand the project's aim, and know why it matters. This has the added benefit of removing ambiguity and leaving no room for interpretation, which is especially important in project management where good, clear communication is paramount.

If you can't do that? Keep working and paring things down until you can. It's harder than it seems, but it forces you to distil what you're actually trying to do down to its purest — and most powerful — essence.

Keep your project plan close, and your project charter closer

Okay, maybe not closer. But for your project charter to really work, it can't just be shoved in a metaphorical drawer. You need to keep it somewhere central where you, your project sponsors, and your project team can all consult it when you need to.

That's where a content collaboration workspace like Teamwork Spaces comes in handy. It allows you to keep your important documents — like your project charter — in a shared, centralized workspace, so everyone knows where to find the information they need.

You can also use features and formatting such as info panels, image galleries and status chips to make your documentation more engaging, and mark the critical ones as Required Reading so you can be sure your stakeholders never miss an important update,

(Learn more about using Teamwork Spaces for the ideation and initiation phase in our ebook!)

A good project charter can set the stage for your whole project, so take the time to get it right.

And once you've done that? It's time to turn it it into a project management plan that means business.

(Learn more about using Teamwork Spaces for the ideation and initiation phase in our ebook!)

A good project charter can set the stage for your whole project, so take the time to get it right.

And once you've done that? It's time to turn it into a project management plan that means business.

Section

09

How to create a project management plan that actually works (template included)

Your project management plan is the map that's going to guide you through your project from beginning to end. Here's how to make a great one that keeps you on track (even when things get weird).

teamwork.

You've been honing your project management skills. You've been reading up on the various PM methodologies. Maybe you've even gotten a project management certification somewhere along the way.

And now that you've successfully written a project charter and identified your key stakeholders, you're ready to turn it all into a full-blown project management plan that's going to knock your project's socks off.

This is where all of your research and preparation pays off in the form of a definitive project plan document that you'll use to guide your project from beginning to end.

But what is a project management plan used for? Why is it so important? And what are the core project management plan components you need to include for it to be a success?

Here's how to make a project plan that actually works.
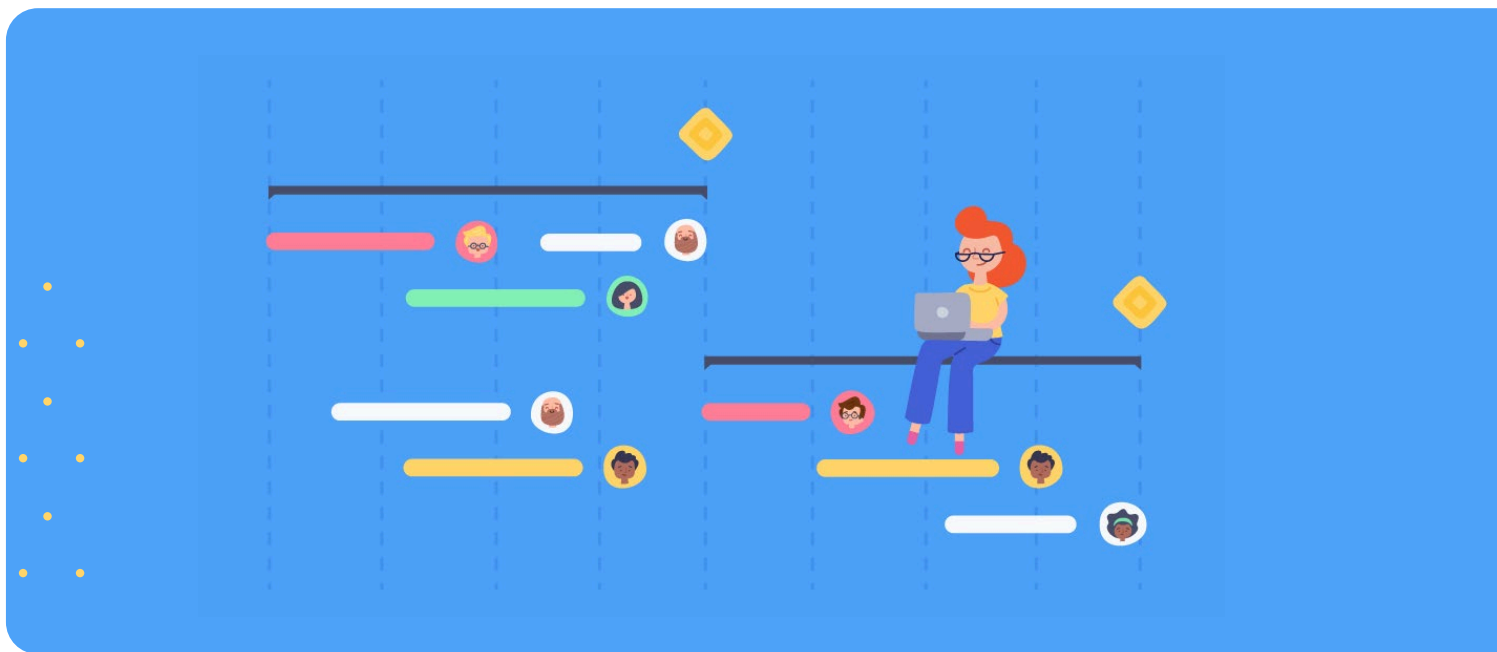
What is a project management plan used for?

Your project plan document is where you go deep on the ins, outs, overs, and unders of your project

Whereas the project charter is the high-level vision for your project, your project management plan is where you break this vision down into the actual day-to-day execution of your project, covering everything you need to do to reach your project goals.

A detailed project plan will plot out everything from timelines to budget, resourcing to deliverables, and more, giving you a blueprint of what needs to be done (and when) that you can use to guide — and assess — your project.
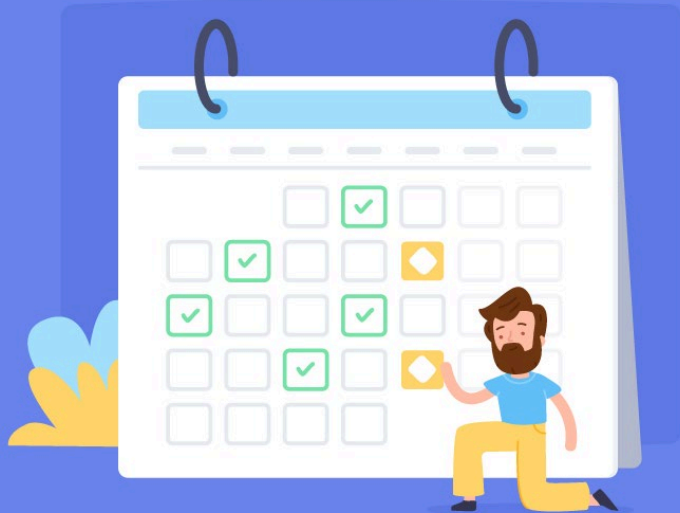
The importance of project management planning

Behind every great project, there's a heck of a lot of preparation.

As a project manager, you'll have tons of things to keep track of at any given stage. Your project plan helps you to take out the guesswork by showing you exactly what you need to be focusing on each step of the way; where your resources and attention should be going; and what you need to be looking out for to ensure things don't become overdue or over budget.
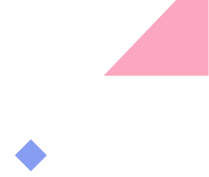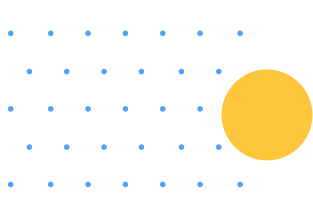
The work you do upfront in creating a project plan will stand to you throughout the lifecycle of the project, allowing you to direct your efforts 100% on delivering results, not scrambling to figure out what you should be doing next.

Here are 5 benefits that highlight the importance of project management planning.

It gives your project a baseline to work with

Working from the approved project charter, your project plan will map out the agreed-upon scope, timeline, and budget for your project in more detail.

Once you have these baselines decided, defined, and approved by the project sponsor, you'll be able to measure the actual execution of your project against the projected progress.

This is super helpful because it means that no matter which stage of your project you're at, you can quickly gauge whether you're delivering the way you planned — and what you need to do to course-correct if you're not.

It creates project alignment (and removes confusion)

No alarms and no surprises: with your project laid out in a detailed project plan, everyone knows what to expect and when.

While your project charter brings you, your stakeholders, and the project team into general alignment, your detailed project plan will ensure there's no room for error or uncertainty by mapping out the exact due dates and deliverables, so everyone can prepare accordingly.

It fully outlines the scope of the project

That alignment has another related benefit, too: avoiding scope creep.
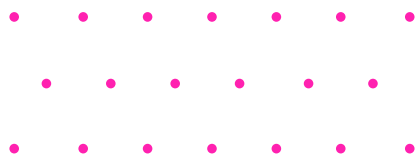
When your stakeholders' expectations and all agreed deliverables are clearly laid out in the project plan document, it's easier to spot when things are out of scope.

And just as importantly, it makes it easier to address them, too. That's because you have a written document or project planning sheet that you can refer back to in discussions, so everyone can be reminded of what they originally agreed to and there's no ambiguity about what's in (or out of) the purview of the project.

It allows for better resourced project management

Once you start to break down the project's work into manageable chunks like deliverables, milestones, and tasks, it becomes much easier to see what kind of resources you'll actually need in order to get it done.

Again, while you may have started to outline this in your project charter at a very high level, your project plan is where you get really granular about how you're planning to use the resources at your disposal.

(Pro tip: for a really great project plan, you'll also want to factor in some wiggle room for when things inevitably change and you have to re-optimizing your resources on the fly.)

It builds confidence in your project

Having a detailed project plan helps to reassure your project sponsor, your stakeholders, and your project team (and let's be honest, maybe yourself if you're having a particularly bad day) of where you're going and why.

Your project plan document builds confidence in your leadership as a project manager, because it allows everyone to see how all of the work comes together to advance the project's — and by extension, the organization's — goals.
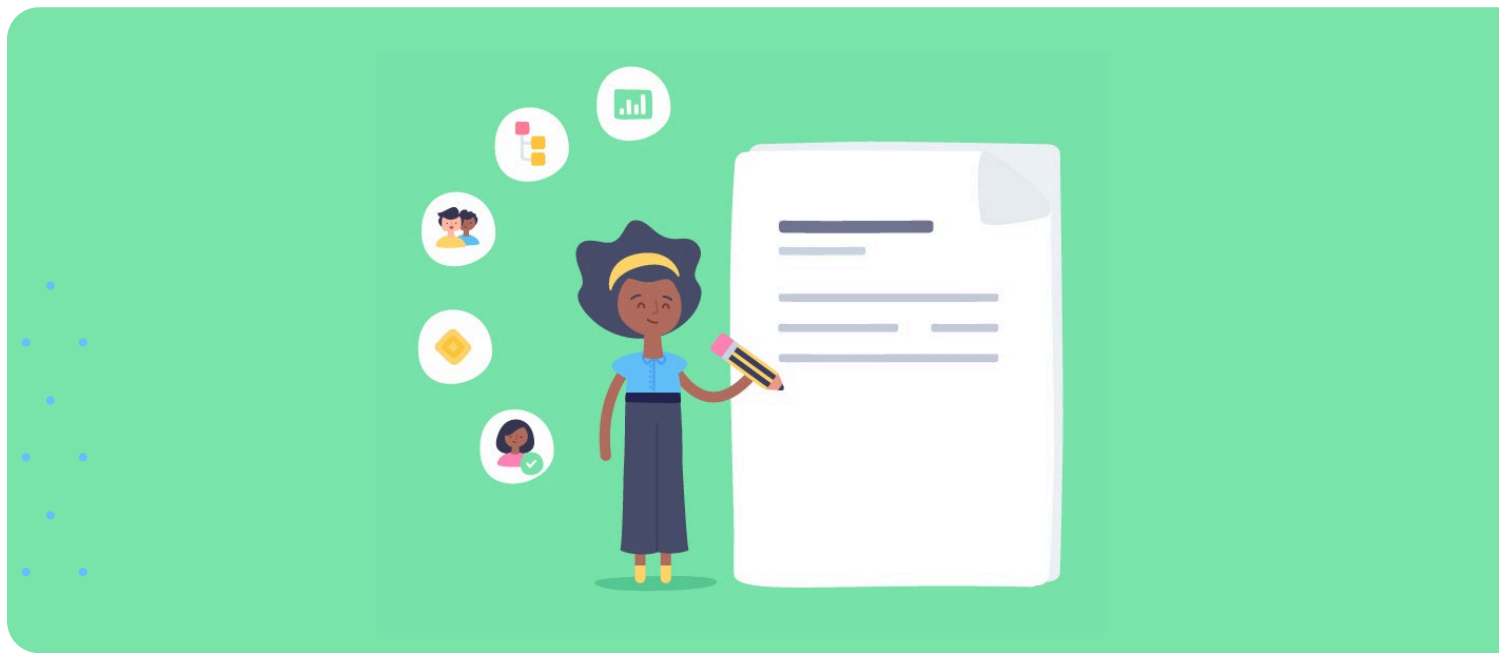
5 things you need to know before writing a project plan

Sound good? Ready to get down to business? Before you dive in to writing a project plan, here are the 5 things you need to ensure you've identified.

1. Identify the baselines for your project

Before you begin writing a project plan, you need to make sure you have the basics down. Start by identifying the baselines for the project's scope, schedule and cost, as the rest of your project planning will need to fit in around those constraints.

As mentioned above, these baselines should already be roughly outlined in your project charter — but here's where you really start to map them out and create accurate estimates. And the more detailed, the better, because these are what you'll be using for comparison to measure how your project performs.

2. Identify your project dependencies

Or in other words, ask yourself: what needs to happen before this other thing can happen? Identifying your project dependencies at the outset of your project means you can plan your timelines more efficiently, spot potential blockers, and ensure that you avoid unnecessary delays.

3. Identify project stakeholders

You'll already have done the groundwork for this in your stakeholder analysis, but as you flesh out your project management plan and think through the phases of your project in more detail, you'll likely start to find more project stakeholders at each phase.

Now is also a good time to go deeper on which stakeholders need to be informed and involved at which stages, for a more comprehensive stakeholder management plan you can use at each phase of your project.

4. Identify project milestones

What are the key markers of your project's progress? It can be a concrete deliverable, the end of a phase in a stage-gate process — whatever milestones make sense to you, breaking your project down into manageable chunks, each with a defined goal, helps to keep the team motivated, allows you to celebrate each achievement, and signposts how the overall progress is coming along. Learn more about using Milestones here.

5. Identify who's responsible for what

Once you start to get a big-picture understanding of the work that's needed and the resources you have to complete it, you can start deciding who should do what. Giving each item an owner is essential to getting things done. No more "oh, was I supposed to do that?" — once you identify who's responsible for what, you can ensure accountability and transparency.
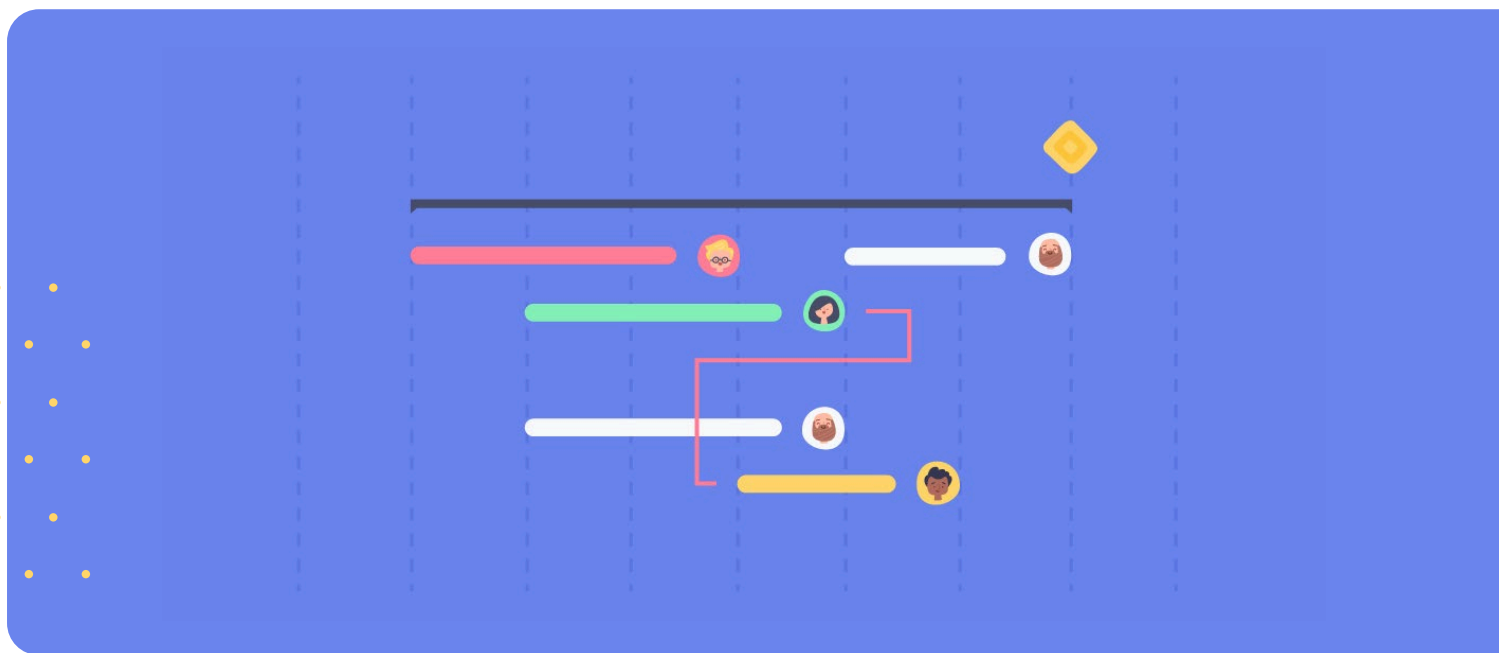
How to make a project plan

1. Start with a high level project plan template

What does a project plan look like in your organization? When you're creating a project plan, start by drawing on any existing materials you can use to guide you, like project plan samples or project plan templates.

Whether your organization provides you with a high level project plan template, a project planning form, project plan samples, or a project planning calendar, leverage any organizational process assets you can.

Don't have a project plan template available? Make your own, and use it for all future projects to save time and replicate your successes.

2. Then tailor it to match your project type

A project plan template or sample project is a great way to get started with your planning, but don't forget to choose the right project plan type for your specific project.

Your project plan should be tailored to your particular project type, team type, and needs.
For example, an IT project plan for a rollout of new equipment will probably look different from a sample agile project plan, both of which will probably look different from more overarching strategic project planning.

Use all the features at your disposal, from task lists to Gantt charts, to make sure that your project plan works for you.

3. Get input from clients, project stakeholders and team members

Writing your project plan in a vacuum will make it harder to get buy-in when it matters.

Involving your stakeholders when you're creating a project plan helps them to feel more represented in the process, and sets the tone for a collaborative working environment that will stand to you throughout the project.

So whether it's a planning meeting, brainstorming session, or one-to-one interviews, make sure you get input from the project's key players when you're developing a project plan.

And as an added bonus? This is also a great opportunity for you as the project manager to continue growing the relationships you started building back in the project charter and stakeholder analysis phases.

4. Incorporate any other project management planning you've done

Your project management plan should be informed by all the other project planning you've done so far: not only the outcomes of the project planning steps 1-5 above, but all the research you've done before reaching this stage.

According to the Project Management Institute's Project Management Body of Knowledge Guide and Standards, some other plans to include as part of your project management plan are:

- Scope management plan

- Requirements management plan

- Schedule management plan

- Cost management plan

- Quality management plan

- Resource management plan

- Communications management plan

- Risk management plan

- Procurement management plan

- Stakeholder engagement plan

While the PMBOK recommends having these 10 plans as standard, you might find that different projects require different approaches.

Nonetheless, even if you don't have a comprehensive document for each one, it's good to cover each of these bases at some stage of your PM planning so you're prepared.

You might also want to include some or all of the following:

- Change management plan

- Configuration management plan

- Performance measurement baseline

- Project life cycle

- Development approach (e.g. predictive, iterative, agile, hybrid)

- Management reviews

If you have these documents already, use them to guide your planning. You can also include them in an appendix to your project management plan so they're always close to hand.

5. Put your project management plan somewhere central

Just like your project charter, your project management plan should live somewhere central where everyone — stakeholders, the project team, management, clients — can access it.

Teamwork Spaces is great for storing all of your important project planning documents in a way that makes them intuitive and enjoyable to read. Mark essential SOPs or processes as Required Reading to ensure that essential info actually gets read.

And if someone has a question that they can't find the answer to? Readers can leave comments on individual spaces to ask for clarification or leave an update.
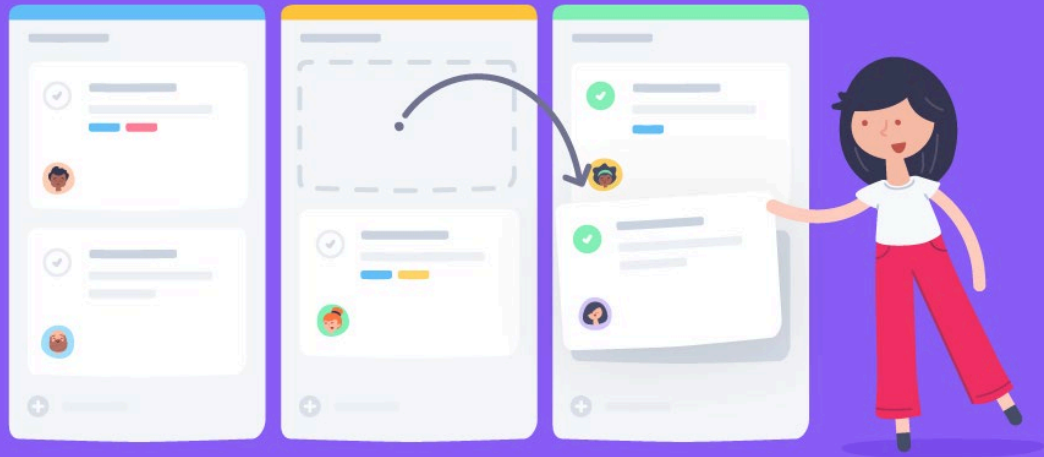
Use a project management tool to turn your project management plan into a plan of action

Once you've documented your project management plan, bring it to life with a project management tool that will help you to stay on track, keep your team accountable, and promote transparency.

Here are 3 ways you can use Teamwork to supercharge your project management plan.

Add your supporting documentation to Teamwork Spaces

Use the Teamwork and Teamwork Spaces integration to link a project in Teamwork with a space in Teamwork Spaces, so your important project documents are only ever a click away.
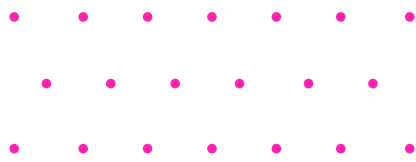
Some documents you might want to add in addition to your project charter and project management plan include:

- Scoping documents

- Risk assessments

- Change management plans

- SOPs for important project processes

- List of stakeholders and their roles

- Outline of approval processes

- Communications management plan

- Any other best practices documentation or supporting info as necessary

You can even embed task lists into your pages and mark tasks as complete right from Teamwork Spaces, so you can keep work flowing without even needing to switch tabs.

Start adding your Milestones

Break down your work into Milestones and task lists that are going to help you reach them. With Teamwork, you can assign an owner to each Milestone, map out your Milestone due dates and see them represented in the project calendar.

Visualize your task dependencies with a Gantt chart

Gantt chart-style views are a useful way to get a visual representation of your tasks and their dependencies, allowing for better scheduling and resourcing. In Teamwork, you can drag and drop to quickly rearrange your project schedulez, without throwing everything out of order or straying off-plan.

Remember: software should support the way you work, not dictate it. So regardless of methodology or team type, create a project plan that works for you and your team — and find a tool that helps you put it into action.

Use our project plan template

Now that you know how to create a project management plan that actually works, you're ready to implement your project plan in Teamwork!

To help you get up and running quickly, we've created a ready to use project plan template. Our project template will help you quickly create project plans that ensure all of your projects are completed on time and on budget

teamwork.

One platform to work together beautifully

Teamwork is project management software for people who want to own the bigger picture. Our suite of products inspire teams to collaborate, communicate, and deliver projects faster by working in harmony. Our mission is to make client-service teams everywhere efficient, organized, profitable, and happy. See what Teamwork can do for your business.

Contact us   **Free 30-day trial**