

# PROJECT MANAGEMENT MADE EASY

1ST EDITION

# PROJECT MANAGEMENT

Risks



Com



System



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# Table of Contents

Introduction .....	3
Module 1 – How Project Management Works.....	5
Module 2 – Project Stages for Small and Medium Projects.....	9
Module 3 – Develop a Project Plan .....	16
Module 4 – Develop an Implementation Plan to Monitor Your Progress .....	26
Module 5 – Project Review and Closure Activities .....	34
Conclusion and Next Steps.....	39

# Introduction

“Begin with the end in mind”

-Stephen Covey

**A**s a small business owner, you're required to wear many different hats. You're an expert in your field, a marketing specialist, a sales person, an entrepreneur, and an accountant. One role you may not think you need to take on is that of project manager.

When you think of project management, many people tend to picture teams in large corporations working on large-scale projects. You may not be aware that many of your small business' processes are actually projects as well. You may not feel the need to understand how project management works, since it's assumed that a small business owner can handle everything themselves.

However, proper planning is required even for small projects in small businesses. An investment in planning upfront can make the entire project much easier to implement and more effective in the results you get. There are many benefits for you, as a small business owner, in learning the basics of project management and the stages that a project goes through.

Following standard project management principles helps you to efficiently manage costs and resources, and to more effectively meet client expectations. The result is a business that's more manageable and profitable. Project planning keeps your business and clients healthy and happy.

In this course, you'll learn proven project management processes and strategies specific to small and medium sized businesses. You will then apply

what you've learned to one of your own projects.

By the time you finish this course, you'll be able to:

- Clearly define and understand the stages of a project appropriate to small or medium sized projects.
- Develop a project plan to help frame and organize your project.
- Develop an implementation plan to monitor the progress of your project.
- Plan your project review and the activities needed in order to finish and close a project upon completion.

## **Expectations**

Before we start the course, take a minute to think about what you want to get out of it.

In the Action Guide, write down three skills you expect to gain.

Now that you're clear about what you want this course to deliver, we can get started.

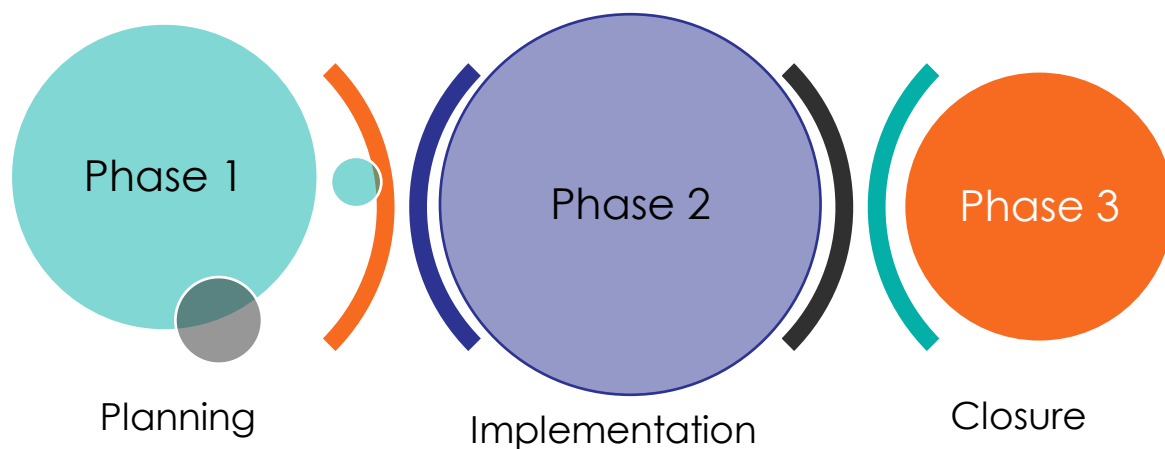
# Module 1 – How Project Management Works

Project management is a well-established and practiced methodology for medium and large businesses. But even for large companies, many projects are small or medium in scale; in other words, the exact kinds of projects that you as a small business owner will also be carrying out. These projects can range in scale from organizing an event to designing a logo and theme for a client's website.

First, let's define exactly what a "project" is, since the term is so wide-ranging. A project is something that:

- Is temporary. In other words, it has a definite beginning and end.
- Is unique. It has a specific set of operations designed to achieve a particular goal.
- Has boundaries - in terms of cost, time, performance, resources and scope.
- Satisfies customer objectives and goals, whether directly or indirectly.

Once a project is identified, there are three key phases in its life cycle:



- Planning
- Implementation
- Closure

What this means is that a project is something your organization does beyond its routine, ongoing tasks and activities. Stop here for a moment to consider business operations you've carried out in the last few days that fit into this category.

An important challenge for small businesses is to identify correctly what is a "project" and what is "work." If you miss a project and identify it as work, and thus fail to give it the proper planning it needs, the results can be disastrous. You'll end up with a project that is not executed well. It will lack the upfront planning, tracking, and follow-up that it needs.

Furthermore, when you fail to recognize a project for what it is and instead see it as a collection of related tasks, you'll most likely end up incurring higher costs, missing deadlines, and frustrating all of those involved, including team members, customers, and stakeholders.

One major area that suffers when a project is not carefully planned is communication. When small projects are not managed, key communications such as status updates can easily be missed. This can lead to all kinds of problems, such as confusion over deliverables and deadlines. In a worst-case scenario, this lack of communication can alienate stakeholders and cause them to become disengaged, with the possibility that they may terminate a project.

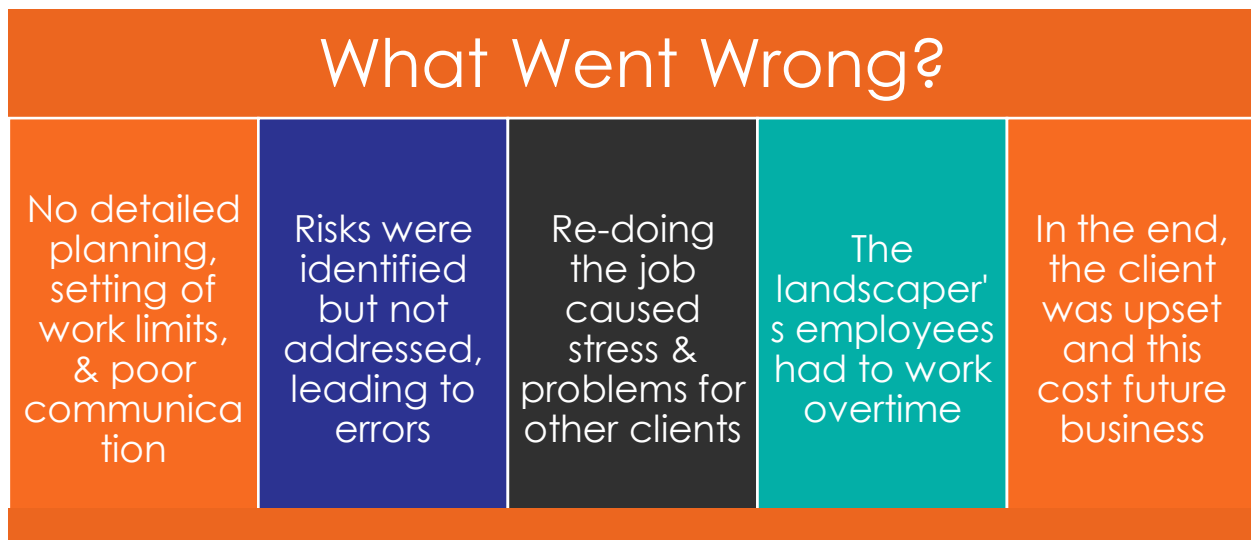
## When Project Planning Goes Wrong – An Example

To illustrate what can go wrong when a small business doesn't plan well, let's look at a landscaping company. A customer calls and requests a landscaping job. The landscaper goes to the client's home and completes an initial consultation. The client agrees to the work and the job begins.

Upon starting the job, the landscaper discovers some issues that were not discussed with the client. Rather than contacting the client to ask about these issues, the landscaper goes ahead and does the best they can, making various changes along the way since they have other jobs coming down the line.

When the work is completed, the client is furious because the landscaper didn't honor their wishes. As a result, the client refuses to pay. The landscaper must redo the landscaping the next weekend free of charge, and this pushes back the other work that has come since this job began.

### What went wrong in this example?



- There was no detailed planning, no setting of work limits, and insufficient communication.
- Risks were identified but not addressed, leading to errors that cost a great deal of money.
- Re-doing the job was stressful and a waste of time, and caused problems for other clients who were waiting for their work to be done.
- The landscaper's employees had to work overtime, costing the company directly.
- In the end, the client was upset and this cost future business from the client and potential referrals.

You can clearly see that a little project planning goes a long way. All of this could have been avoided if the small landscaper had treated everything as a project and not just work.

In this course, you'll learn proven project management processes and strategies specific to small and medium sized businesses. You will then apply what you've learned to one of your own projects

### **Action Steps:**

1. From the work tasks that you do, list some examples of work vs. projects. Remember that projects are temporary, unique, and satisfy customer objectives. Are there some examples from your business that you should have treated as a project?
2. How do you manage your projects today? Do you have a formal process or tools that you use?



## Module 2 – Project Stages for Small and Medium Projects

Small and medium-sized projects are quite different from large projects. In this module, you'll learn the key project stages for all projects, and how they relate specifically to small and medium-sized projects so that you'll be ready to start applying them to a project of your choice as you go through the rest of the course. In the following modules we'll examine each stage more closely.

### The Characteristics of Small and Medium Projects


What makes a small or medium-sized project different from a larger project? Here are a few key differences.



- **Duration.** Small projects take a matter of hours, days, or weeks, whereas large projects extend over months or even years.
- **Lower Risk.** A small project is not as likely to impact a business's long-term success in a negative way if it doesn't go well. If a large project fails, it could be a crisis for the company.
- **Few Stakeholders.** There are few people affected by the outcome of a small project.
- **Small Team.** A small project has a relatively small number of people responsible for its implementation.
- **Emphasis on Reaching Goal.** There is often an attitude of "getting it done" with a small project, while a large project has a long lifecycle, more maintenance, more milestones, and less emphasis on final completion.

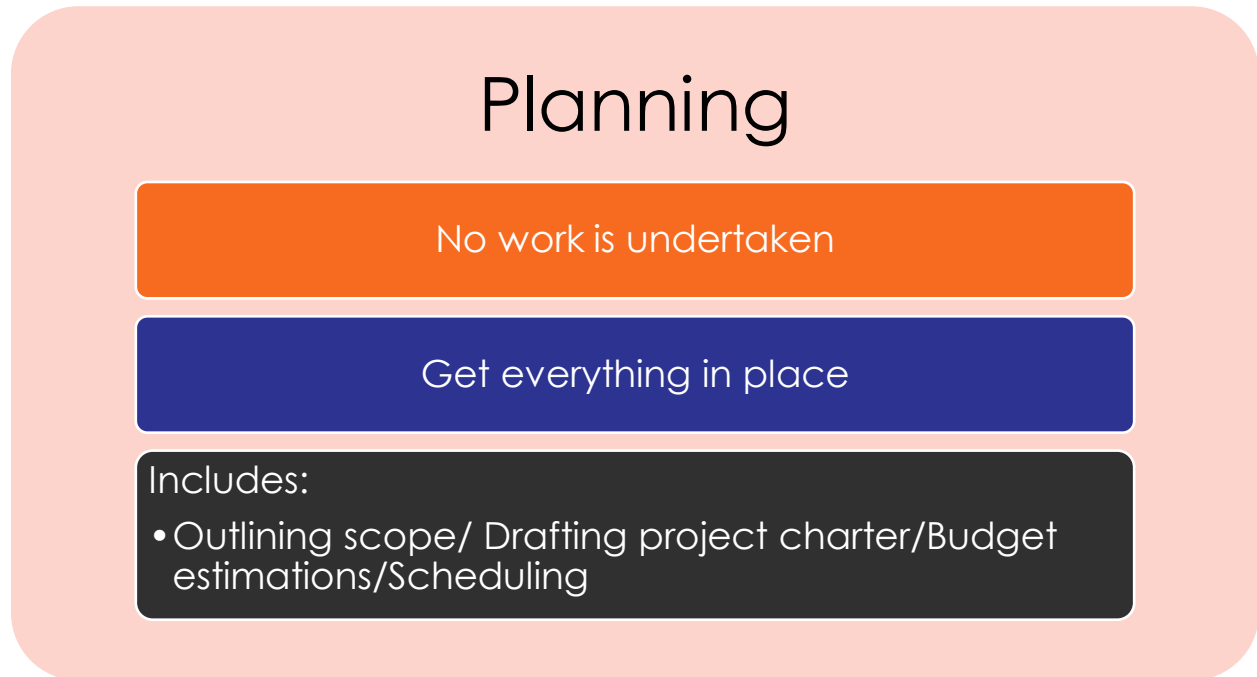
In the introduction, you learned that it can be disastrous to mistake a project for regular work. How do you know if the task at hand should be considered a "project?" Here is a checklist to help you decide.

## Is it a Project?

- 
- The work involves stakeholders or their feedback
  - It's the first time your company has undertaken this kind of work
  - The outcome of the project isn't assured
  - It puts your business at some kind of risk where planning may help
  - The work is unique or temporary in nature
  - Timeline and deadlines are key to the project
  - The work is larger in scope than what your business is used to
  - The time, money, resources needed to complete are unknown
  - There is a great deal of collaboration & communication involved

In module 1, we identified the three key phases of project planning, implementation, and closure. Here, we'll take a closer look at what those mean for a small or medium-sized project.

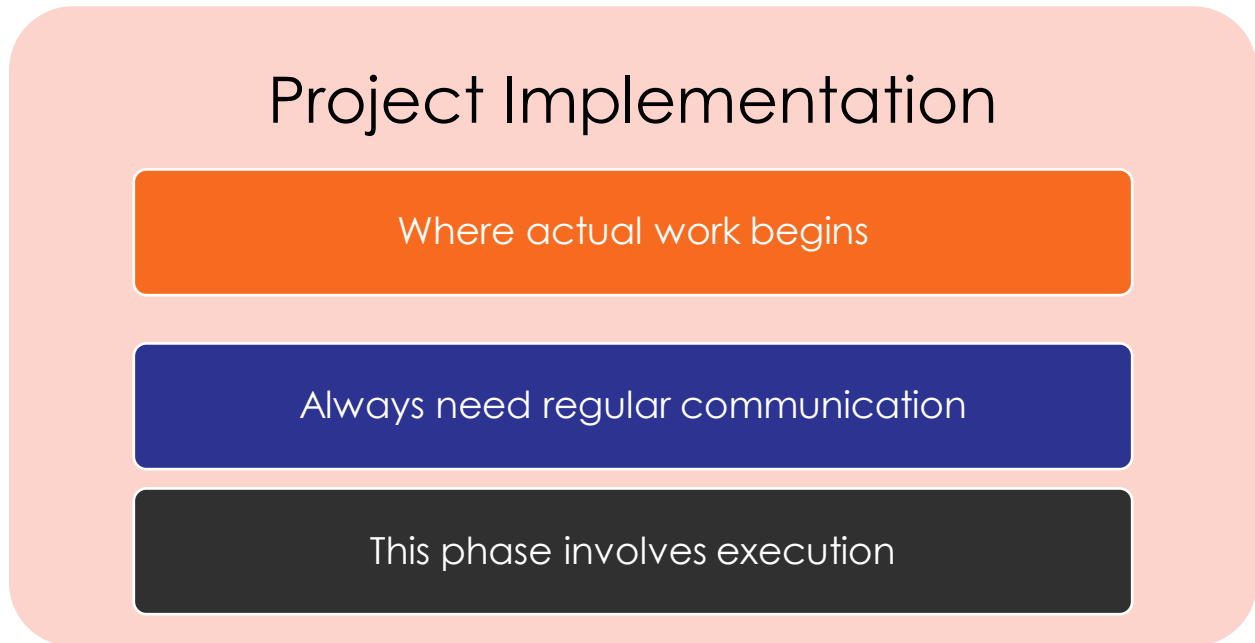
## Project Planning



During the project planning stage, no work is undertaken on the project. During this phase, you are strictly planning and organizing. The goal is to get everything in place so that work can begin and proceed smoothly.

Planning includes outlining the scope of the project, drafting a project charter and getting it sanctioned by its sponsors, and making careful budget estimations and scheduling. Each of these major components will be covered in the next chapter on planning.

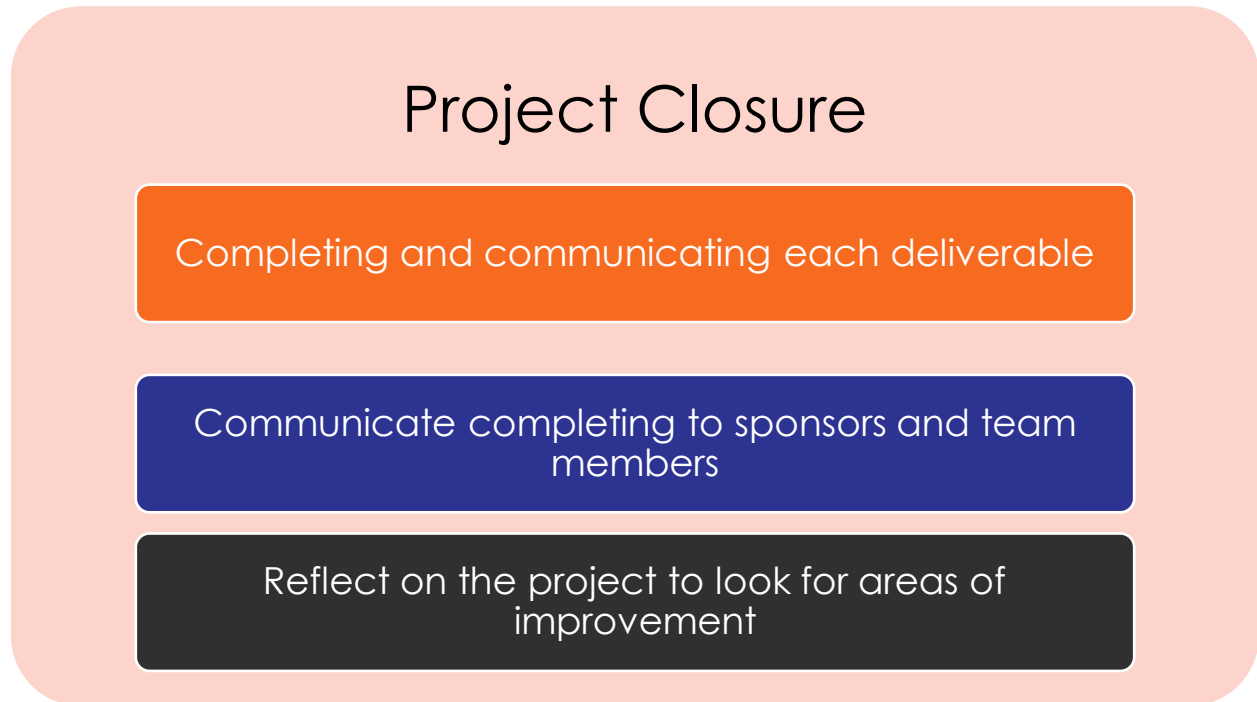
## Project Implementation



This is where the actual work on the project begins. On any project, no matter what the size, there will be a need for regular communication. The communication requirements for small projects are generally smaller, but since communication is so important, it cannot be overlooked.

For the most part, this phase involves project execution, which is the actual carrying out of the project plan that you created in your scope documents and schedules.

## Project Closure

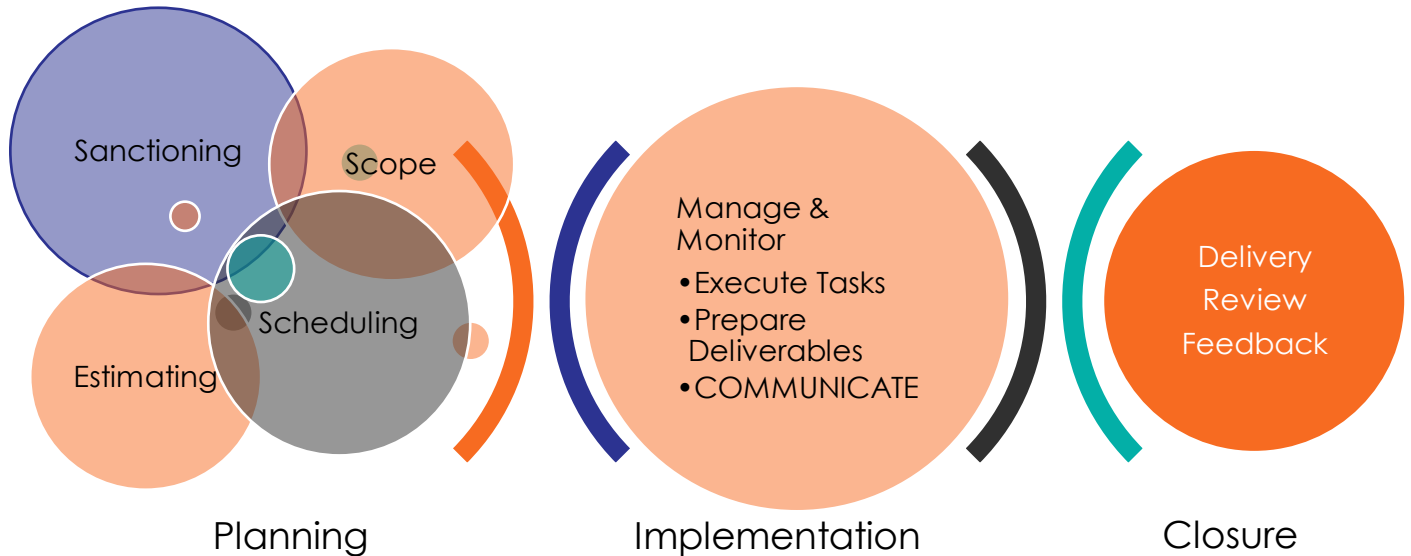


The main part of this phase is completing and communicating each deliverable. You need to communicate to the project sponsors that the project is completed and send all of the files or materials they need. You also need to communicate to all members of the project that it is officially closed.

This is also an important time for reflection. Since projects tend to be unique for businesses, you need to discuss key lessons learned with everyone involved. Count your successes and look at problems or failures in order to identify areas of improvement. Seek feedback from all involved, including the project sponsors.

Here's the big picture view of the entire 3-phase project management process. We'll be covering each of these phases in more detail in the

remaining modules of the course, so keep it handy as a reminder of how everything fits together:



### Action Steps:

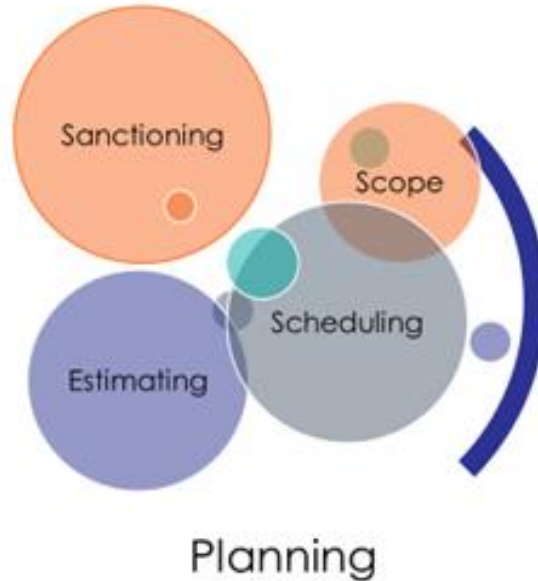
1. Select a project of your choice to use for the duration of this course.

This could be work that should have been treated as a project (think back to where you identified examples of work vs. projects).

If you don't have anything current, is there a specific type of work that you do that would lend itself well to project management, or a project that you've been wanting to do?

Remember that projects are temporary, unique, and satisfy customer objectives.

## Module 3 – Develop a Project Plan



In this module, you'll create an actual project plan that will help you frame your project. This process will help you create guidelines and protocols, so that you can repeat the project in the future and carry it out more effectively and efficiently. You can save your plan and use it for other types of projects in the future too.

Proper planning is the key to effective management. If you invest the time in planning well upfront, this is one of the best ways to ensure that the project goes smoothly and successfully achieves its aims.

One of the biggest mistakes businesses make here is to assume that because a project is small, it doesn't require the same thorough planning as a large endeavor. A person may jump right into the work without planning.



However, lack of planning can have the same problems for small projects as it does for medium and large projects.

The planning stage takes the most investment and effort, but if it's done well, the rest of the project simply involves execution and reporting. The effort expended here means less effort and less decision-making later.

There are four key components to project planning: Project sanctioning, project scope, estimating, and scheduling.



## Project Sanctioning

Sanctioning involves getting the approval of the project sponsor before the project officially starts. First, you need to identify who the project sponsors are.

A project sponsor is the party that is, in simple terms, asking for the project to be carried out. The sponsor can be either internal or external stakeholders. If you are working with clients, the client is the project sponsor. When this is the case, the client is the number one authority on everything that goes on. The client determines whether or not the project is

a success. In this situation, the client is referred to as "top level support." Top level support is the person who is authorized to sign off or make purchases.

**The project charter is a document that outlines what the sponsor or client expects the project to produce.**

This is a statement of the scope, objectives, and participants in a project. It's an overview that allows everyone involved in the project to easily understand its purpose and objectives. The charter is intended to be a business document, not a technical document, so it should be a short summary without every little detail.

**Project sanctioning occurs when the sponsor signs off on the charter.**

There may be other external sponsors as well. Internal sponsors include supervisors or other departments within your company. In some cases, you may be running a project for yourself. Examples of this would be things like setting up your own website, opening an ecommerce store, or carrying out a marketing campaign. In this case, you don't need to sign off, but you still need a project charter that outlines the project and its requirements.

Be cautious of project handoff. If the person you're working with directly during the project is different than the signing authority, make sure the individual who signed your charter is your point of contact. It's called "project handoff" when one person signs off on a project and then another becomes a point of contact. This can cause major miscommunication and confusion.

**Example 1:**

Let's imagine that you are a salon owner working with a bridal party to plan hair and make-up for a wedding. If the bride is paying but the bridesmaid calls to make changes to the specs, always verify the changes with the bride herself. She is the official sponsor and signing authority.

### **Example 2:**

You're an instructional designer developing an online module for a company. You work with the executive director of the client company for budgeting and scoping, but the executive director then introduces you to a subject matter expert who then becomes your main point of contact. Remember that it's the executive director, not the subject matter expert, who needs to sign off on the charter.

It's okay if your point of contact is another person other than the signer for the purposes of regular communication during the project. But be careful whenever changes are asked for or when approval is needed.

### **Example 3:**

Let's say that you're managing social media profiles for a dentist who is the signer, but your point of contact is the dentist's office manager. If the office manager asks you to set up an additional profile, you need to verify with the dentist first.

In other cases, you may be asked to work with a team from your client company. For example, you're a virtual assistant planning a retreat for your boss's key clients. You may be asked to work on the details with his other team members, but the boss himself or herself must sign off on the charter, which outlines the main goals and deliverables.

## **Project Charter**

As part of sanctioning, you also need to draft the project charter we just mentioned, before getting started. The project charter includes the details of the project, such as its objectives, sub-phases, tasks, resources, and so on. It also includes the next two components, estimating and scheduling. Along with the objectives, the charter should define all business issues or impact that the project is addressing.

At the top of your project charter, list the essential people associated with the project. These include:

- Project Name
- Project Sponsor
- Project Manager (the person in charge of the project)
- A list of all members of the project team

There should then be a project description, which summarizes the major points of the project including its purpose.

One of the most important parts of the charter is the project scope. This defines exactly what the project entails and what it doesn't. What it doesn't entail is "out of scope," meaning that these things are not handled by the project manager and team, but by someone else; in other words, the project sponsor needs to use their own resources to get these things done.

The scope should include things like:

- Business issues to be addressed by the project
- Business impact to be addressed by the project (expected results)
- Project objectives
- Main project deliverables
- In scope
- Out of scope

You may also include examples of optional items that would be "add-ons" which are out of scope but can be arranged.

This charter document should include the final due date for all deliverables and a place where the project sponsor will sign off on the project after reading this document.

## Estimating

Your project plan charter should also include a specific breakdown of the smaller tasks that make up the project and a schedule for starting and finishing each.

During the planning phase, you need to figure out how much investment of time and other resources each part of the project is going to take. In order to do this, you need to break it down into its constituent tasks and consider each task separately. This is called Work Breakdown Structure (WBS).

### Example:

You're a graphic designer and the deliverable for your project is a logo for a company. There are a number of tasks that include: getting your client to fill in a form about their company; first drafts of three logo options which must be sent to the client and approved; a first draft of the logo idea chosen by the company based on the client's feedback; a final revision of the logo again using client feedback; and packaging the final digital files for the client.

Using WBS, you would estimate the time each of these tasks would take. You can then estimate how long the overall project will take.

## Scheduling

Finally, schedule your tasks by putting all of them in a logical order and on a fixed timeline. This will create a workflow that ensures the work will get done in the right order by the deadline. As you sequence the individual tasks you identified, the total amount of time added together will determine the project length.

Keep in mind that you'll have your regular work and responsibilities as well. You may also be managing multiple projects at one time. Pad your estimates at first and don't over-promise on when you can have the work done. As you carry out more projects similar to this one, you'll naturally develop a better handle on juggling new projects with regular work.

Use your calendar to schedule the parts of your project. If you're using multiple calendars combine them into one and make it collaborative so that the others involved can see it. Book all of your activities, including calls, appointments, independent work, meetings, and research. If they're all in one place where you can take in your tasks at a glance, this will make fitting in your project much easier.

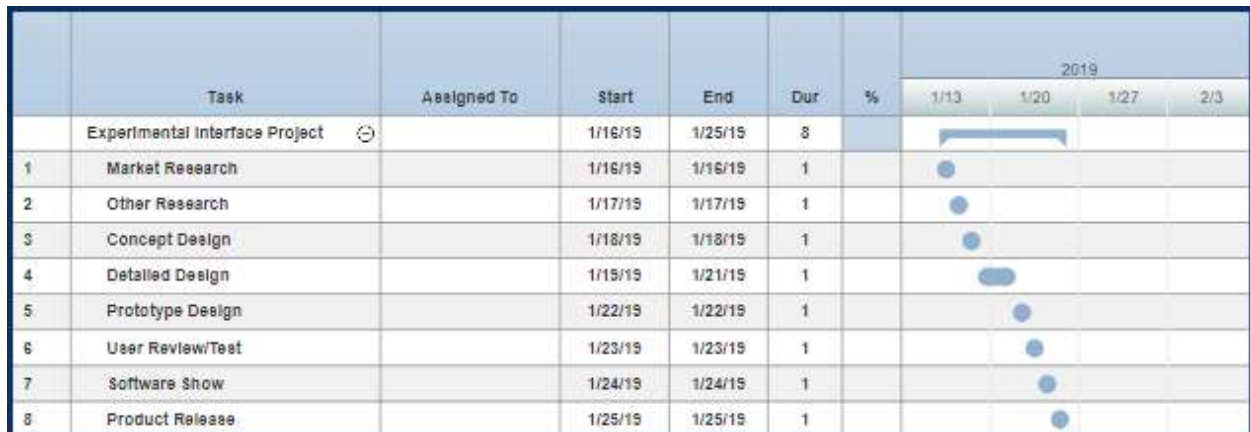
There should be a section of your project charter where the above tasks are listed. Take each major milestone and list all of the tasks that need to be accomplished. Clearly identify who will be responsible for carrying out each task, a date for when it will be started, and a date for when it will be finished. Please refer to the "Project Plan and Charter Template" to see an example of what this document would look like.

## Project Planning Tools

There are a number of useful tools you can use in project planning. The tools mentioned here are just a sampling of what's available. These are tools that have a generally good reputation among project managers.

### Gantt

One tool you can use is a Gantt chart. A Gantt chart is a bar chart that provides a graphical illustration of a schedule. It helps you to plan, coordinate, and track specific tasks in a project. You can see an example of a Gantt chart [here](#). And here's another example of one created using [Smart Draw](#):



### Asana

Asana is a web-based software-as-a-service designed for project team collaboration. It creates a virtual workspace that allows team members to work together without the use of email or any other outside communication. You create a workspace and then add projects to it. Each project can have tasks added to it. In each task, users can add notes, comments,

attachments, and tags. Team members can set up updates so that whenever a change is made, they'll be notified by email.

### [Basecamp](#)

Basecamp is a web-based project management tool that includes a wide range of features such as to-do lists, wiki-style web-based text documents, milestone management, file sharing, time tracking, and a messaging system. It's very comprehensive. Basecamp is free for your first project and then \$29 per month.

### [Trello](#)

Trello is a web-based project management application that uses visual representation to make project management easier. It gives you "cards" for each task. Trello works on a freemium business model where the basic service is free but there's a premium full service version as well.

### [Google Drive](#)

Google offers a free way to create and collaborate on files in Google Drive – Docs, Sheets, Slides, Forms, Photos, and more. You can see when someone else is working on a file, and you can upload and download file formats from programs like Microsoft Office. Storage is free for up to 15 GB in Drive, but can then pay to upgrade to a larger amount of storage.

We've included a list of other possible project management tools in a separate handout since there is an endless array of choices.

## **Tips on Choosing and Using Tools**

Whatever tool you choose, make sure it's something you're comfortable with. If it's a premium service, take advantage of a free trial to see if it's



easy for you to use. Simple tools are the best. Many people use Excel or Word simply because they're already familiar with them.

One option if you're already using tools such as these is to use a cloud service like Dropbox, OneDrive, or Google Drive. Once in the cloud, every member of the project can access them, make real-time updates, and enable notifications. By not having to learn a new tool, you can save time.

### **Action Steps:**

1. Choose a project management tool.

Then, using the project you identified and the provided Project Plan and Charter Template, create a project plan that incorporates as many of the elements discussed in this module as possible.

Get input from team members or your project sponsor to fill in any blanks.

# Module 4 – Develop an Implementation Plan to Monitor Your Progress



The next phase of project management is implementation. In this module, you'll create an implementation plan to help you monitor the progress of your project and ensure that it will be completed as soon as possible, with deliverables meeting deadlines. You'll create repeatable processes and templates that you can use for future projects as well.

The project implementation stage is where the work actually begins. It starts when you begin to execute the activities that are outlined in your project plan charter. During this phase, you'll be working to prepare the deliverables and carry out the sub-sets according to your schedule.

While project management duties are heavy during the planning phase, they're very light here. You'll be shifting your attention to managing rather than planning the project. The most important part of managing this phase is communication. You will need to deliver updates to the parties that need them, using the tool of your choice. Along with time, you'll also be managing the budget.

## Good Communication

As mentioned in the last module, keep all of your tasks, milestones, and deliverables on a single calendar. Use tools to make it easier. The other major concern is reporting and communication.

The communication requirements of small projects are generally smaller than those of large projects. However, regular communication is a key part of the success of any project no matter what size. You should report at least a weekly status update. The status update should include:

What has been accomplished since the last report

An update on time and money budgets

Any variations there might be from these budgets

Any project issues that have arisen

- What has been accomplished since the last report
- An update on time and money budgets
- Any variations there might be from these budgets
- Any project issues that have arisen

For small projects, the most common medium for communication is email.

Here are a few ways to manage email so that your communication will be as effective as possible:

- Most people are swamped with email messages. Try to keep messages to a minimum and only send emails when it's really necessary.
- Create categories for your emails so that they're easy for your recipients to understand (for example, the subject line might say "Action: Response Required" to indicate that it requires a response).
- Keep your emails concise and to the point.
- Use bullet points and lists to summarize key points.
- Create different emails for different topics to avoid long and cluttered emails.
- Use the ABC Approach:
  - **Action summary:** A quick summary of what you expect the reader to do based on the email, like an abstract for an article.
  - **Background:** The body of your email where you use bullet points or numbers to focus on key points.
  - **Closing:** This is where you can add incidental notes if there are relevant things to include. These notes might be distracting at the

beginning or in the middle. Here, you might also highlight the next action steps that need to be taken.

Here is an example of an email that uses the ABC approach:

*"Hi Carl,*

*Thanks for your continued support on the ABC project. We need to do another lab test in order to tighten the specs as instructed by the client.*

*Here is the deal:*

- *The specs are a little high on the recent sample*
- *Production following these specs would be a little more expensive than expected*
- *The client has authorized additional funds for more lab testing and there is some flexibility on time (they can push back the due date for the sample if more testing is required).*

*We will deliver more detailed specs to you by tomorrow afternoon. Please proceed with another lab test as soon as possible and notify us when the sample will be ready to send.*

*Regards,*

*Rick"*

## Email Responses

When responding to requests, it's a good idea to confirm your understanding and the next steps you should take. Although you want to keep emails short and to-the-point, avoid saying things like "Alright," "Sounds good" or "I'm in." Instead, confirm specifically what you understand the situation to be. Say things like:

- "Okay, we will carry out another laboratory test as soon as we get the go-ahead from you."
- "I will attend the sales meeting and make sure the points you have specified were covered."
- "We will submit the revised design to you by 17:00 Friday."

This confirms that the respondent understands what action they're being asked to do and eliminates any confusion that could occur.

You can send status reports as email updates, but you should plan to actually speak with the project sponsor on a regular basis as well. This depends on the length of the project, but as a general guideline it should be once every week or two weeks.

Email makes communication quick, easy, and convenient, but there are several situations where it's better to pick up the phone instead. These include:

In the beginning, communicate in-person, on the phone, or with an online communication tool.

Changes in the terms for deliverables, scope of the work, or the details of the schedule.

Situations that require approval where the details are complex or have changed since the original agreement.

Any situation that requires clarification or detailed explanation.

Sensitive subjects that involve things like personnel, staffing, or personal matters.

Anything that you feel is difficult or complex.

When there are a large number of emails or where the project sponsor is not responding to your emails.

- Establishing a business relationship. In the beginning of a business relationship, it's good to communicate in-person, on the phone, through Skype, or with another online communication tool.
- Changes in the terms for deliverables, scope of the work, or the details of the schedule.
- Situations that require approval where the details are complex or have changed since the original agreement. For simple or small changes, email is fine.
- Any situation that requires clarification or detailed explanation.
- Sensitive subjects that involve things like personnel, staffing, or personal matters.

- Anything that you feel is difficult or complex.
- A situation we refer to as "email overload" where there are a large number of emails or where the project sponsor is not responding to your emails.

**Example:**

<b>Communications</b>			
<b>Type</b>	<b>Audience</b>	<b>Frequency</b>	<b>Notes</b>
<i>Kick off call</i>	<i>Project team</i>	<i>Once</i>	<i>Beginning of call</i>
<i>Weekly status emails</i>	<i>Project team</i>	<i>Weekly for 8 weeks</i>	<i>On Tuesday of each week to allow further required actions throughout the week</i>
<i>Monthly call</i>	<i>Project sponsor</i>	<i>Project mid-point</i> <i>Monday Sept. 10 @ 10 am</i> <i>Project end</i> <i>Monday October 10 @ 10 am</i>	<i>Project manager to call sponsor</i> <i>Set up Go to Meeting the week prior for screen sharing</i>
<i>Deliverable emails</i>	<i>Project sponsor</i>	<i>Draft: Sept. 5</i>  <i>Final: Oct. 10</i>	



### **Action Steps:**

1. Using your project plan, add in communications using your tool of choice, or the template provided. Be sure to include the following for communication:
  - What frequency will you use to track your project? Weekly, bi-weekly?
  - What frequency will you communicate to your project sponsor? Weekly, bi-weekly?
  - How will you communicate with your project sponsor? Email? Phone?
  - If you use email, under what circumstances will you phone instead?
2. Using your calendar tool of choice, add in any key project deliverables, and communication touch points.
3. Draft a sample project update email or modify the example email in this module.

# Module 5 – Project Review and Closure Activities



**W**hat is important at the closure stage of a project is to deliver results to your project sponsor. In this module, we'll look at how to plan your review and closure activities in a way that produces satisfying results and helps you improve on future projects. Like the other processes you've worked through already, in this chapter you'll create a repeatable process you can use for future projects.

## Communications at the Closure Stage

Good communication is just as crucial in the last stage as in all stages that came before. For each deliverable, you'll need approval from the project sponsor.

A great way to reflect on the project and boost team morale is to celebrate the successes of each deliverable. Host a small party for your team members with pizza, sweets, or coffee and create a presentation that highlights key moments in the process. Use the presentation to drive home the success of the project and what, in particular, made it successful.

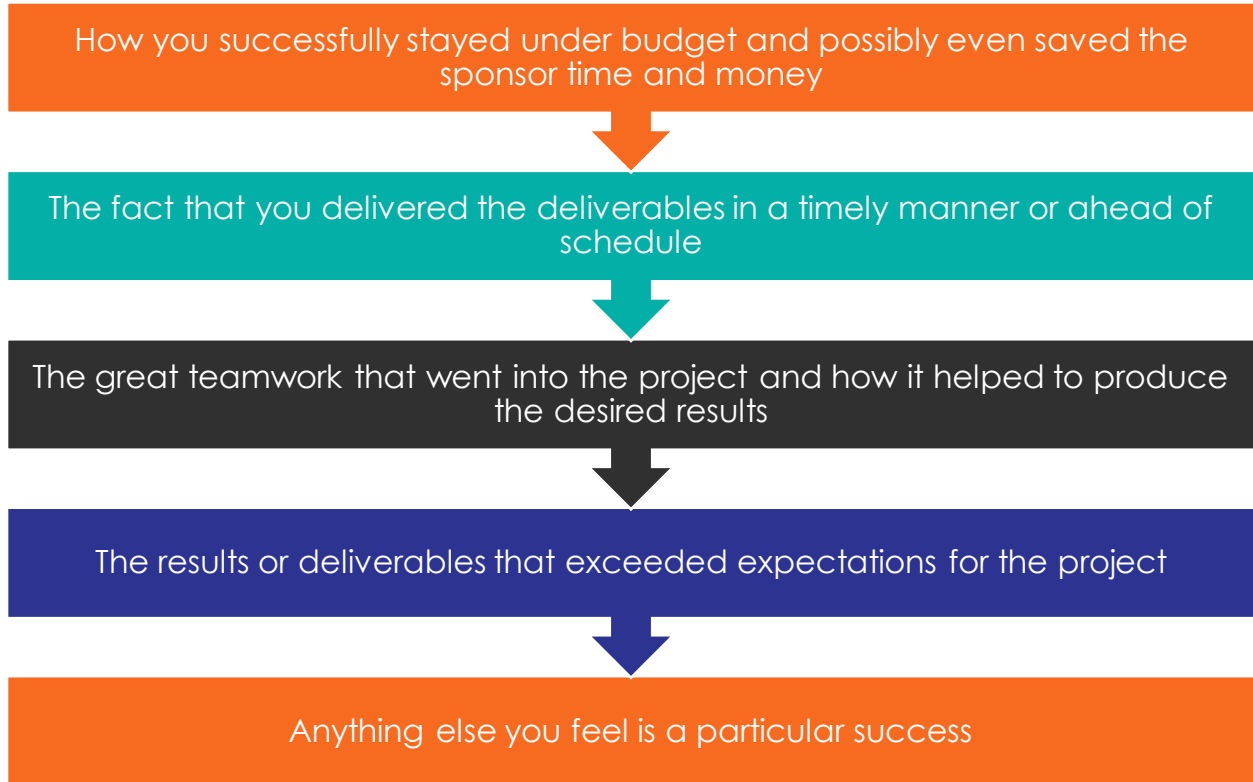
## Closing the Project

After all of the deliverables are completed and approved, you need to officially close the project. Recognize team members for their contributions and thank them for their hard work. Let everyone know that the project is officially finished.

An important part of this process is to contact the project sponsor by phone or in person to get their sign off. Walk through the final stages of the project and all of the deliverables with them to make sure they're satisfied with the project's results.

This is a good time to highlight with the sponsor as well the successes of the project. Some things you might want to stress to the sponsor include:

- How you successfully stayed under budget and possibly even saved the sponsor time and money
- The fact that you delivered the deliverables in a timely manner or ahead of schedule
- The great teamwork that went into the project and how it helped to produce the desired results
- The results or deliverables that exceeded expectations for the project
- Anything else you feel is a particular success



Naturally, as you go over the project details with the sponsor, you should avoid mentioning anything that went wrong, unless it showcases how you turned the problem around and achieved greater success because of it. If the project's failures are mentioned, downplay them and explain to the sponsor briefly how you learned from them.

This process isn't just to encourage more similar projects from the sponsor in the future, but also a way to reflect yourself on the successes of the project.

## Getting Feedback

As part of this process, you also need feedback from the sponsor. Verify with them their level of satisfaction with the final deliverable. Find out if there are any areas where they are not satisfied. Your goal is to continue to engage with this client for future work as well as referrals and other opportunities in the future.

### Example 1:

You may find that the client was unhappy with a format used for the deliverables. Possibly, this is a tiny detail that was left out of the initial project planning. If this is the case, you would want to ensure that you include in the pre-project planning exactly what format you will use for deliverables.

### Example 2:

Another example is that you may find that the client was particularly pleased that the work was finished early. This may have exceeded their expectations a great deal and enabled them to move forward in their work, thus earning them more gains. If this is the case, you may want to push back deadlines on future projects and create this same "wow" moment for future clients. Exceeding expectations in a way such as this gets you more work and referrals.

## Lessons Learned

A critical step that is often left out of this process is to re-cap and consider with your team what lessons you can learn from the project. Each project is a learning opportunity, especially when it's the first project of its kind. Take time to reflect and consider what changes you could make to ensure the project is more successful next time.

It's important to have the input of your team members. They may identify an important lesson that you hadn't considered. If you undertake the project by yourself with no team, reflect by yourself and try to consider every aspect of the project.

Variables to consider when thinking of lessons learned include things like project time, cost, budget, and schedule. You should discuss and share these lessons learned in a meeting and consider drafting a document that outlines this feedback for each project.

### **Action Steps:**

1. Think back to some work you have previously completed. Can you think of some lessons learned that you could apply to your current project?
2. In the past, how have you improved processes based on previous project successes or challenges? Where applicable, make any adjustments to your project plan to reflect any lessons learned that you might want to incorporate into your current project.
3. Update your calendar to include important dates. As well, add in a follow up email reminder for 30 days out after the project closes to reach out to the project sponsor.
4. Draft a sample of an email template that you can use as your follow up email.

## Conclusion and Next Steps

**N**ow, it's time to create an action plan for completing your project plans so that you can start implementing what you've learned immediately and make your next project a success.

The most important thing for you to come away from this course with is to know that project planning is different for small projects, but no less important than it is for big projects. Proper project planning pays off in a huge way.

Following the project planning guidelines that you've learned in this course will not only help you with specific projects, but will also facilitate better communication in your regular work. These are simple processes that you can easily implement and see the results of immediately.

In this course you learned:

- The importance of proper project planning even for small projects
- How project planning is different for small businesses and small projects
- The three key phrases of project planning and what's important for each
- How to effectively plan every aspect of your project before work begins
- The keys to good communication which will help your project proceed according to plan
- What to do at the end of the project to make sure everything is finished to the satisfaction of the project sponsor

- What you can take away from each project in terms of lessons learned and improvements to be made.

The next step is to take all of the material from your learning activities throughout this course and implement them in your business.

### **Action Steps:**

1. Review all your notes, worksheets, and checklists from the course.
2. Note key remaining tasks and deadlines for completing your project plans
3. Next, implement the project plan you created in this course.