

Six Steps of Project Management

STEP 1: MAP OUT THE MATTER

- Identify the component tasks
- Prioritize the tasks
- Set a project timetable, including deadlines for each task
- Consider which components can be delegated
- Create a master to-do list
- Create written protocols for complex tasks

STEP 2: CHOOSE THE ASSIGNEES

- Weigh the need for speed against learning opportunities
- Assess prospective assignees' capabilities
- Consider current workloads
- Consider who might be challenged by a particular assignment
- Create a distribution list with names and assignments

STEP 3: BRIEF ASSIGNEES ON ESSENTIALS

- The client's interests and goals
- How each specific assignment fits into the big picture
- Deadlines and parameters of the project timetable
- Resources and sample documents to use in completing assignments
- Your schedule and availability as project manager
- Other assignees and supervisors involved in the project, including clear delineation of responsibilities
- Other parties to go to with questions and concerns
- Schedule for team meetings
- How case files are to be maintained
- Possible follow-up tasks to be assigned

STEP 4: SUPERVISE THE PROCESS AND MONITOR PROGRESS

- Set interim deadlines
- Assess progress against the plan and make adjustments as necessary
- Hold regular team meetings that include (1) a planned agenda for each meeting, (2) circulation of updated to-do lists, and (3) discussion of individual and team accomplishments to date
- Review e-mail and other updates from team members
- Respond to questions and drafts; circulate pertinent information
- Anticipate new developments and plan for them
- Keep the client (and partners, as necessary) apprised of the matter's progress

STEP 5: REVIEW ASSIGNEES' WORK, BOTH ONGOING AND FINAL

- Find areas for praise
- Identify areas for improvement
- Show how the final product is used
- Describe evolving expectations
- Provide continuing guidance and resources

STEP 6: DEBRIEF AND COMMUNICATE THE FINAL OUTCOME

- Discuss the level of client satisfaction
- Ask what was learned during the course of the project
- Review highs and lows
- Ask assignees what they need to learn in response
- Develop "next-time" strategies and talk about future steps