

Simple Project Management for Small Business

Six Easy Steps to Success



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GetApp would like to thank the following people for their contributions to this book.

- **Eleanor Mayrhofer** – [e.m.papers](#)
- **Elizabeth Harrin** – [A Girl's Guide to Project Management](#)
- **Josh Nankivel** – [pmStudent](#)
- **Lyndsay Scott** – [Arras People](#)
- **Peter Taylor** – [The Lazy Project Manager](#)

Table of Contents

Introduction	1
What is Project Management?	3
Why Is Project Management Useful For Small Businesses?	5
6 Easy Steps To Start Managing Projects In Your Small Business	7
Things That Can Go Wrong With Your Project	10
5 Steps To Find Software That Can Help You Manage Your Projects	12
Resources To Help You With Project Management	14
Courses/Certifications	14
Infographics	14
Blogs and Articles	15
Project Management Software Reviews	16
Connect With Project Managers On Twitter	16
Other Project Management Resources	17
Common Project Management Terms	18
Share this ebook!	20



Introduction

Much of the time when people hear the term “project management,” it conjures up a visual of huge projects that take hundreds of people, lots of money, and a good bit of time to complete.

But the reality is, many projects are much smaller than those we imagine. Most small business owners juggle numerous projects at any given time. You may not think of the things that you do as projects, but consider this list for a moment.

- Remodel your website
- Develop a new marketing campaign
- Create a new product offering
- Hire an employee
- Coordinate a joint venture
- Plan a newsletter
- Deliver client services

Any of those sound familiar to you? These are just a few of the projects you might be involved in at any given point in time. And, most likely, you’re juggling multiple projects at the same time.

That means you have to coordinate resources and manage deliverables for multiple

items all at once. And the problem with that is things can fall through the cracks. How would you answer the following questions?

- Do your projects get done on time?
- Do your projects make money?
- Do you track work as it gets done?
- Do you monitor how much money and time is being spent during a project?
- Has a customer ever said, “This isn’t what I wanted.”

If you answered no to any of the first four questions or yes to the last one, it’s time for you to take a serious look at how project management can help your small business.



Things To Do

PRIORITY

What is Project Management?

It's likely you've encountered problems in your business that were tough to solve. Project management is an organized process that can help you solve those problems with the least amount of hassle. It sounds complicated, but it's not. Have you had any of these problems in your business?

- Miscommunication between team members
- Client product delivery that had to be reworked when you thought it was complete
- Overruns on client projects
- Missed delivery dates on client projects
- A recurring internal problem that just won't go away

You're not alone. Many small businesses struggle with these very same issues. And most small businesses can't afford to waste time and effort spinning their wheels to accomplish work. It can be the catalyst that puts you out of business. Using a project management approach in your business can minimize confusion, rework, errors and best of all, it can help you delight your customers.

So what's the "official" definition of project management?

According to the Project Management Institute (PMI), which is known as the authority for project management knowledge and processes, the short definition of a project is "a temporary endeavor undertaken to create a unique product or service."

And here's the long version:

“Project management, then, is the application of knowledge, skills and techniques to execute projects effectively and efficiently. It's a strategic competency for organizations, enabling them to tie project results to business goals — and thus, better compete in their markets.”

If you ask ten people the definition of project management, you're likely to get ten different answers. We tapped a few of the most influential project management professionals on the internet for their definition:





Why Is Project Management Useful For Small Businesses?

Small businesses don't have the luxury of abundant resources to accomplish each task. It's likely that every employee in your business wears several hats at a time.

That's why project management is so useful for small business. It will help you make the most of your resources (even if the only resource is you), manage your budget, and deliver quality solutions to your customer. It can even help you make your internal business processes work better so it takes less time and effort to get things done. In short, project management can help you turn chaos into order.

Here are four reasons why project management is so valuable to small business:

1. **Makes big goals achievable** – With a project management approach to your goals, you can seize opportunities, solve problems and realize the success you seek.
2. **Reveals gaps and pitfalls** – All projects are not meant to become reality. If you're like most small business owners, you have more ideas than you could complete in a lifetime. Using a project management approach can help you see the gaps in your thinking and provide the "cons" of completing a project before you've invested a lot of time, resources, and money in the project.
3. **Breaks down the overwhelm** – Do you dream big and then get exhausted thinking of all the things that have to be done to realize that dream? Project management helps you "chunk up" the work into bite sized pieces so you can make progress and avoid getting so overwhelmed that you get nothing done.

Nothing can motivate more than small rewards along the way to achieving a big goal.

4. **Gets the work out of your head** – Writing down what needs to be done to accomplish your goals will help you get done faster without a lot of rework. Having to remember everything that needs to be accomplished just clutters up your brain and creates a prescription for disaster.

One of the main advantages of being a small business is using innovation and creativity so you can get products and services to market quicker. It gives you a competitive advantage.

Project management expert Lindsay Scott says, “Project management in small businesses not only allows them to remain competitive through change and innovation but it also allows an organization to manage these changes in a structured way, increasing the likelihood that any project would be delivered successfully.”

And that’s the objective – to deliver projects successfully – so you can sustain your business.

But you don’t have to go “full out” with the PMI structured Project Management Body of Knowledge (PMBOK) on managing your projects. Scott adds, “Adopting even a ‘light touch’ project management framework can enable an organization to effectively choose which projects to run; when to run them and by whom. With project management comes control and with control comes the ability for management to keep a tight rein on developments that affect the future of the business.”



6 Easy Steps To Start Managing Projects In Your Small Business

Way too many small business owners use a “Fire, Ready, Aim” approach to accomplishing projects. In the short run, this method may seem faster than planning your efforts, but this approach is fraught with danger and can cost your business lost time, money, effort and worst of all, dissatisfied customers.

It’s been proven time and again that planning ahead can save time, money, and effort when it comes to projects. The basic premise is that an issue found in the planning stage will cost a lot less than an issue uncovered later in the lifecycle of your project.

This is known as the 1:10:100 rule. Here’s the breakdown.

- It’s least expensive to plan well and resolve all problems in the concept and planning stages of your project.
- If an issue is not resolved in the planning stage, it will cost 10 times more in the development stage
- Lastly, it will cost 100 times more if the issue is uncovered after the project has been delivered.

There’s a lot of value in thinking through and planning your projects before beginning. It’s not rocket science by any stretch of the imagination. You simply need to clearly define the “Why, What, How, Who, and When” of getting things done before you actually begin the work.

Small business owner Eleanor Mayrhofer – a corporate refugee like many of today’s small business owners – developed a methodology for completing projects when she was launching and growing her business e.m.papers. She calls it “[Steal This Process](#)” and it’s specifically focused on helping small business owners use a project management approach to getting things done.

Her method describes essential steps to take into account every time you are thinking of starting a project to avoid complications and wasted effort. It’s structured around six simple steps that are important to successful projects: **Defining Goals**, **Developing Scope**, **Estimating**, **Planning**, **Executing** and **Reviewing**.



1 - Goals

The first step is to define the “Why” of your project. Think about and write down what you want to achieve at the conclusion of this project. This is the basic foundation of your project and what will guide you along the way.

2 - Scope

With your goals in mind it’s time to think about the “What.” At this point you should think about the deliverables of the project. What has to be done in order to achieve the proposed goals above? Define each of the tasks so it is clear what needs to be done.

3 - Estimation

At this step you should define an estimate of how long each of the defined tasks will take to be completed.

4 - Planning

You already know what has to be done and how long each of the tasks will take, now you will use that information to identify how long it will take depending on the resources you have available. Put it on a timeline so you will have a visual of the total time it will take to achieve your goals and complete your project.

5 - Executing

It's time to get things done. Check your plan daily and follow the tasks you have identified. Problems can appear, so update your plan as you go to keep everything on track. Most important in the execution phase is not straying from your plan.

6 - Reviewing

Reviewing the project is part of the process to ensure you stay on track. You'll want to do this periodically as you progress through your project and at the end when the project is complete. Reviewing will help you understand what worked, what didn't work, and will provide you with valuable insight for the next project.



Things That Can Go Wrong With Your Project

In a perfect world, your projects will go from start to finish without any changes or problems. But we don't live in a perfect world and the reality is, you will encounter problems along the way and be required to make adjustments on the fly to ensure a successful end to your project.

There are any number of things that can go wrong, so we tapped Peter Taylor, The Lazy PM, to find out some of the more common problems you could encounter in your project.

- **I couldn't deliver the project in the estimated time. What happened?**

To answer the "what happened," don't be afraid to run a simple lessons learned process to identify the cause of any variances to estimates. Were you too optimistic about what you could achieve? Were the tasks not specified to the right level? All tasks should be broken down to short work packages to allow good tracking of your progress.

- **Some tasks can't be done in the assigned time and it's delaying the project.**

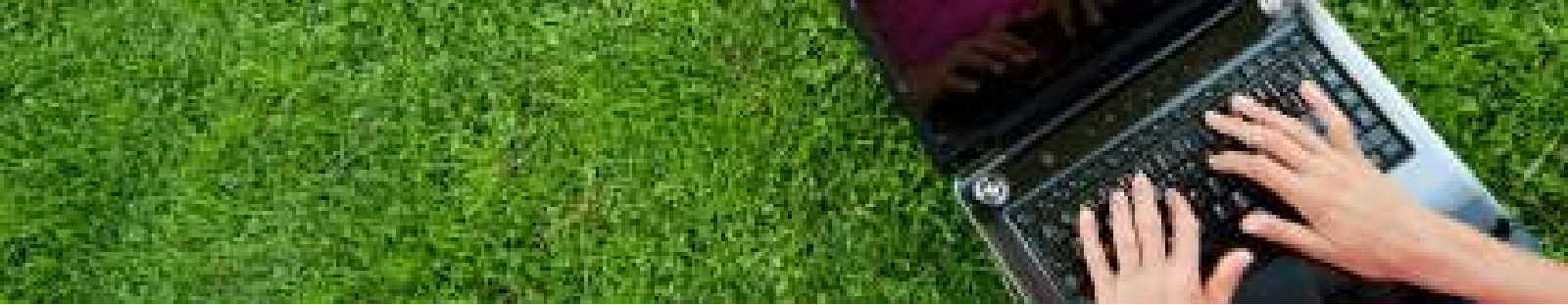
First, recognize this as an issue for any future projects – you'll want to learn why this is the case and how you can avoid repeating the problem in the future. Second, take the time to review all of the outstanding tasks and, based on the actual time to complete earlier tasks, re-baseline the project to determine a realistic project completion date.

- **I can't handle managing so many projects.**

A sure sign of this is when you spend 100% of your time “report producing” rather than actually managing projects. Too many projects means that you have to prioritize – assess of risk impact of all of your projects failing to deliver so you can give each project the right level of attention.

- **The tool I wanted is too expensive for what I really need.**

Do you really understand what it is that you do need? It is often best to use standard office and other tools when you start managing projects so you really learn what it is that you ‘need’ to manage the project. And then, after a period of time, you can better articulate what it is that is essential to your requirements and what software will help you with your project management tasks.



5 Steps To Find Software That Can Help You Manage Your Projects

When you start out using a project management approach to getting things done in your small business, you'll most likely use the tools at hand – MS Office tools like Word and Excel, Google Docs or just plain paper and sticky notes. Those will work fine for you, but you may find as you become more adept at project management that you want a software tool to help you become even more productive.

It's important to find the right tool to help you achieve those goals, so here's a five step process that can narrow it down for you.

1. Identify your needs

Detail the requirements you are looking for in a PM tool. Identify which methodology you will use to get projects done and the components that would be most helpful in achieving your goals. Brainstorm a list of those items that are most important to you. Some of the more common requirements are a strong collaboration system, multiple team member access, simple task management, and mobile integration.

2. Get a comprehensive list of applications

The best place to find a comprehensive list of project management applications is at GetApp. Take a look at the list here - [Project Management Software Options](#) - read what other users have to say by checking reviews and do comparisons of the software tools. Dig deep into software reviews on our blog to discover more details about each tool.

3. Create a short list

After reviewing the multitude of options available, it's time to create a short list of applications to narrow down your options. Compare the offered features with your business needs from Step 1, and check what prices match your budget. Choose two or three applications for this short list.

4. Use the trial period

Most cloud business apps offer a free trial period. Use this time to test the applications you've put on your short list by testing out a current project or two. Compare the features and ease of use for your team. Identify which of the applications best fits the needs of your business.

5. Go for it!

Once you've identified the best application for your business, sign up for your preferred plan, create your team's credentials, and start using it.



Resources To Help You With Project Management

Courses/Certifications

- **Project Management Institute (PMI)**
<http://www.pmi.org/>
- **Arras People**
<http://www.arraspeople.co.uk/project-management-directory/project-management-training-directory/>

Infographics

- **25 Top Online Project Management Software**
<http://www.getapp.com/infographics/top-online-project-management-software>
- **How to Become a Project Manager**
<http://www.liquidplanner.com/blog/2011/8/1/how-to-become-a-project-manager-infographic.html>
- **Causes of Conflict in Project Management**
<http://www.pm4girls.elizabeth-harrin.com/2012/03/infographic-conflict-in-project-management/>

Blogs and Articles

- **Top 10 Project Management Influencers to Follow on the Web**
<http://www.getapp.com/blog/project-management-influencers/>
- **What is Online Project Management for Small Business?**
<http://www.getapp.com/blog/project-management-small-business/>
- **How Do I Encourage Innovation in My Projects?**
<http://www.pmhut.com/how-do-i-encourage-innovation-on-my-projects>
- **Four Key Drivers for Team Engagement**
<http://www.pm4girls.elizabeth-harrin.com/2012/03/four-key-drivers-for-team-engagement/>
- **The Projects Story Circle. Talking About Transitions**
<http://www.projectsshrink.com/the-project-story-circle-talking-about-transitions-6004.html>
- **The Human Factor in Project Management**
<http://www.blog.pmbookclub.com/2012/01/human-factor-in-project-management.html>
- **PM Book Club**
<http://www.pmbookclub.com/>
- **Agile is a Must for Dev-Shops!**
<http://www.planbox.com/blog/agile-project-management/agile-is-a-must-for-dev-shops.html>
- **5 Steps for Managing a Remote Project Team**
<http://www.mavenlink.com/community/blogs/383-5-steps-for-managing-a-remote-project-team>

- **Project Management's Holy Grail**

<http://blogs.attask.com/blog/strategic-project-management/project-managements-holy-grail>

- **How to Build a Project Plan**

<https://www.clarizen.com/community/blogs/how-to-build-a-project-plan.html?pid=5008>

- **Save Your Sanity! Maybe It's Time For A Project Management Tool**

<http://www.getapp.com/blog/small-business-project-management-tool/>

- **I'm Ready to Outsource, Now What?**

<http://www.getapp.com/blog/ready-to-outsource/>

Project Management Software Reviews

- **Comprehensive List of Project Management Cloud Applications**

<http://www.getapp.com/project-management-software>

- **List of Project Management Software Reviews**

<http://www.getapp.com/blog/tag/project-management>

Connect With Project Managers On Twitter

- Follow the hashtags #pmot (Project Managers on Twitter) and #pmchat (Project managers chat)

Other Project Management Resources

- **Steal This Process**

<http://stealthisprocess.com/>

- **Free Project Plan Template (MS Word)**

<http://goo.gl/pYbbi>

- **Free Project Gantt Chart (MS Excel)**

<http://goo.gl/dUaZU>

- **Free Simple Work Breakdown Structure and Gantt Chart (Google Doc)**

<http://goo.gl/kYnvk>

Common Project Management Terms

Agile

Agile is a set of methods for software development. It is based on iterations and individuals over processes and tools, working software over comprehensive documentation, customer collaboration over contracts and responding to change over following a plan.

Charter

A Project Charter is a short document containing the scope of the project, its objectives and the participants. This preliminary document should identify the stakeholders, define the project manager authority and delineate roles and responsibilities.

Critical path

Refers to an algorithm that identifies linked tasks, which indicates if one of them fails the whole project plan is affected.

Gantt Chart

This chart visually represents the tasks of a project with their duration on a timeline. This visualization model can also display dependencies between the tasks.

Lean

The main principle of Lean is to be more effective and productive, which means deliver an end product with more value and less waste of time or resources.

Life Cycle

The start to end process of a project. A traditional Project's Life Cycle consists in four different phases: Initiation, Planning, Execution and Closure.

Milestone

Milestones represent the completion of key deliverables or important decisions during the execution phase of a project and are used frequently to monitor its progress.

Project Management Body of Knowledge (PMBOK)

One of the main books on project management practices. It describes guidelines and defines global standards managing projects.

PMP

This acronym stands for Project Management Professional. It is the main certification for a project manager, offered by the PMI.

Prince2

This is a standard in Project Management based processes. It is extensively used by the UK Government and recognized internationally by the private sector.

Project Plan

A formal document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document approved scope, cost, and schedule baselines. A project plan may be summarized or detailed.

Scope

The scope of a Project is the breakdown of all the work that has to be done to deliver the end product.

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