Nimble project management for the time- and budget-challenged

This situation may sound familiar: you are a new manager, a team leader, or a team of one; you are working on a variety of projects that differ in complexity, scope, and importance; and you’re drowning. There’s too much to remember, details are being overlooked, timelines are not being followed, priorities are unclear, and there is no way you have time to learn about how to manage all these projects.

This chapter will outline one solution: a lightweight framework for busy managers of small to medium projects. It includes a flexible, transparent way to document project plans, milestones, and other requirements, using tools freely available on the web. This methodology has been used in varying iterations at Virginia Commonwealth University (VCU) Libraries for web project management since 2010. Though the examples in this chapter are web application projects, the principles and techniques can easily translate to non-web projects as well.

A disclaimer about project management

This framework is helpful for managers of small to medium projects who are not formally trained as project managers. Larger-scale enterprise-level projects that rely on large implementation teams are an entirely separate undertaking. In these cases it may be helpful to bring in a dedicated project manager. There is likely an abundance of literature in your own library that addresses project management techniques. For more robust techniques specifically for libraries’ unique business models, *Web Project Management for Academic Libraries* (Fagan and Keach, 2010) offers instruction grounded in theory and practice. The book’s methods can also extend to non-web projects.

A note on using web-based tools
The techniques in this chapter leverage Google Docs spreadsheets as the primary repository for project information. Web-based document management software allows several affordances that non-web spreadsheet editing software cannot. With web-based software, managers can:

1. Edit documents from any computing device with an Internet connection and a browser, at any time;
2. Embed or link to documents from other web pages without requiring readers to download files or launch separate applications;
3. Share documents with team members, who can use the documents for reference for their work and update the documents with their progress on tasks;
4. Share documents with stakeholders, who can see the project requirements and work status and understand overall project priorities;
5. See past revisions to documents.

If you or leaders of your organization are hesitant to store documents on third-party servers, a web-based solution may not work for you. Some organizations may expressly prohibit storing work-related documents on another organization’s servers, while others may proscribe certain software packages for document management. Because the documents in this chapter are spreadsheets, any spreadsheet application will do, but web-based tools offer easy collaboration, flexibility and transparency that non-web software cannot.

Primary tool: the master projects list

If you use nothing else in this chapter, build a master project list. This spreadsheet will be the go-to document for your team and the key element in your tool kit.

What is it?
The master project list is a combined spreadsheet of all the projects on your team’s radar, from small to large. The list should at the very least include a name for each project, its priority in comparison to other projects, and its status. At a glance, you, your team, and others within your organization should be able to see which projects your team is aware of, which projects you are working on, and which are most important.

Why have it?

- **Keep stakeholders in the loop.** Project owners, your supervisor, your team members, and others within your organization can check in on the status of their pet projects or others’ projects.

- **Help you field new projects.** When a new project request comes in, there is a framework for understanding where that project will fit in with other projects.

- **Give a general idea of your team’s workload.** This 30,000-foot overview can help when you need to readjust the priorities on the list, give others a realistic idea of timing for new projects, or lobby for new team members.

- **Help you and your boss determine your priorities.** Assigning priorities together with your supervisor will help align your work with the larger needs and goals of the organization.

- **Manage your time in the short and long term.** The project list can serve as a dashboard for you, allowing you to track your team’s progress and plan into the future.

- **Track your successes.** A list of completed projects helps you assess your team’s accomplishments, write end-of-year reports, and demonstrate value to your organization.

What’s in it?

For each project on the list—remember, no project is too small—you can include any or all of the following information, presented here in order of importance:
- **Project name:** a short, descriptive, novice-readable name that will help you identify the project in communications to your team and the rest of your organization.

- **Short description:** a brief description of the project and the business need.

- **Link to project plan:** if you have developed a separate project plan for this project (covered in the next part of this chapter), add the link.

- **Priority:** how the project stacks up against others. How priorities are named is up to you. VCU uses A/B/C, but you could also use high/medium/low; critical/urgent/whenever; or any other schema you’d like. Developing some rubric for assigning project priorities, informal or formal, will help save time when assigning priorities in the future.

- **Status:** your team’s progress on the project. VCU uses the following: pending, administrative review, underway, complete. This field can also be used for more specific notes on where the project is. Example: “Underway - ready for departmental test.”

- **Project lead:** the person on your team who is responsible for carrying out the project.

- **Project owner:** name and e-mail address of the person who initiated the project or is most impacted by the project.

- **Category of project:** what type of project it is; categories are up to you. Depending on the size of the project list, being able to filter or sort by the project category may be helpful.

  Secondary tool: the individual project plan

  Depending on the complexity of individual projects, you may want to develop a separate project plan document for each.

What is it?

The project plan is a document for each project that covers the basics of the project, its business need, goals, requirements and stakeholders. For more complex projects, the document
may be made more complex to include timelines, tasks, milestones; and serve as a working
document for you and your team.

Why have it?

- **Clarify scope and business needs of the project.** Setting the project goals and scope early
  on can prevent scope creep in the future.

- **Understand dependencies.** Very few projects exist in isolation. Understanding projects’
  impact on other systems, processes, or users early on helps avoid headaches later.

- **Break project down into tasks and milestones for your team.** Depending on the project’s
  complexity, the project plan may include a detailed task list or general milestones.

- **Make an honest estimate of time.** Though creating a project plan takes time, the project
  plan can save time by helping you accurately estimate how long a project will take.
  Thinking through functional and strategic questions ahead of time will save time later.

- **Communicate expectations of stakeholders and team members.** Getting the project in
  writing clears up misunderstandings and clarifies roles and responsibilities.

- **Keep stakeholders abreast of project status.** Whether the project is broken down into
  discrete tasks or chunked into larger phases, the project plan can serve as a working
  document that you and your team can use to keep yourselves and stakeholders informed
  of the project status.

What’s in it?

Depending on the complexity of the project, you may wish to include all or only some of
the following information. The important part is to balance the project complexity with the level
of detail in the project plan. No need to over-document.
- **Basic information**: Title of the project, short description (both understandable for lay readers), and business justification of the project.

- **Requirements**: The goal of the project, including specific requirements for the project to be considered successful.

- **Dependencies**: Any systems, processes, or people who are affected by or affect the project. This is also a good place to enunciate any non-obvious business rules that will impact your project.

- **Timeline**: A rough outline of the project, chunked into phases or discrete tasks. Project milestones can be set here. If listing tasks, list due dates and responsible team members. Depending on the size of the project you can be as specific or as general as you’d like.

- **Roles**: The person who initiated the project (project owner); the project leader; and any other important stakeholders.

Once you develop your first project plan, you can use it as a template for the next.

**Putting it all together**

The steps below describe how to leverage the sharing features in Google Docs to create a comprehensive package of project documents:

1. Create a shared repository.
   a. In Google Docs, create a folder named after your department.
   b. Place your master project list and all of your project plans in the folder.
   c. Give write access to appropriate users for the entire folder by adding e-mail addresses for your supervisor, members of your team, or whoever else should be allowed to edit the documents.
   d. Give view access to the folder for anyone who has the link.
2. Add a link to the master project list and/or the entire folder from your team’s homepage or other place where organizational stakeholders can easily access it.

3. For each project entry on the master project list spreadsheet, add a link to the individual project plan document, if there is one.

4. After your project is complete, move the project to a “completed” sheet on the master project list. Having a list of completed projects will help you in writing up reports or monitoring your team’s progress.

Finally, be sure to remain flexible in your approach to this system. This is just a suggested framework for managing project information. As you document more projects using this system, you will begin to understand what type of documentation works best for you and your team. Leave behind the elements that are not proving useful, and add others that you find helpful. Each project will have its own unique needs. With this framework you should be able to tailor your approach to each project and create some order from the chaos.

Works Cited