The 5 Essential Project Management Tools Every Small Business Project Manager Should Use

Tuck

Introduction

Did you know that the 7th edition of the Project Management Institute's Project Management Body of Knowledge lists 76 different project artifacts that a project manager (PM) should use? However, we've seen seasoned project managers (particularly those specializing in small business clients) succeed with a library of 10 or even just 5 tools. After all, PMs deliver value by ensuring that a certain body of tasks are completed on schedule, in the right order, and with the appropriate quality and project spend.

In the current economic climate, small businesses need to experience maximal value from our project management services. With a streamlined project library, we can spend more time collaborating, listening, and leading – and less time documenting.

With a project library composed of these 5 critical tools, you can deliver more projects on time, on budget, and with the appropriate level of quality.

KICKOFF DECK

STATUS REPORTS

PM APP / PROJECT PLAN

DOCUMENT REPOSITORY

PROJECT CLOSEOUT CHECKLIST

#1 Kickoff Deck

Every project should start with a kickoff meeting, and a kickoff deck is the easiest way to guide a productive conversation about project objectives and each team member's role.

A well-written deck also serves as the de facto project charter (documentation of your objectives and team) and the communication plan, which means that team members can refer to it to resolve questions like:

> What is the project's scope?

> How do team members communicate with one another?

Kickoff Agenda

While the PMBOK discusses best practices for kickoff meetings, it does not provide a sample agenda. In fact, the term “kickoff deck” is never mentioned (we’re hoping it makes an appearance in the 8th edition). In the next few pages, we’ll list the topics that a comprehensive kickoff deck should include.

What is Project Management for Small Business? Read about it on our blog.

Team Introduction

This is your chance to let the client know who they are partnering with throughout the project.

Team members' titles, contact information, and pictures (when appropriate) serve as a quick reference throughout the duration of the project.

Speaking of teams, click here to learn about how to spot a great technical project manager on our blog

Project Scope

Now is the time to get everyone on the project team on the same page about what you're going to deliver over the next few weeks or months.

Including excerpts from the SOW or business case that best capture the expectations of the project sponsors and stakeholders is a great way to align the team.

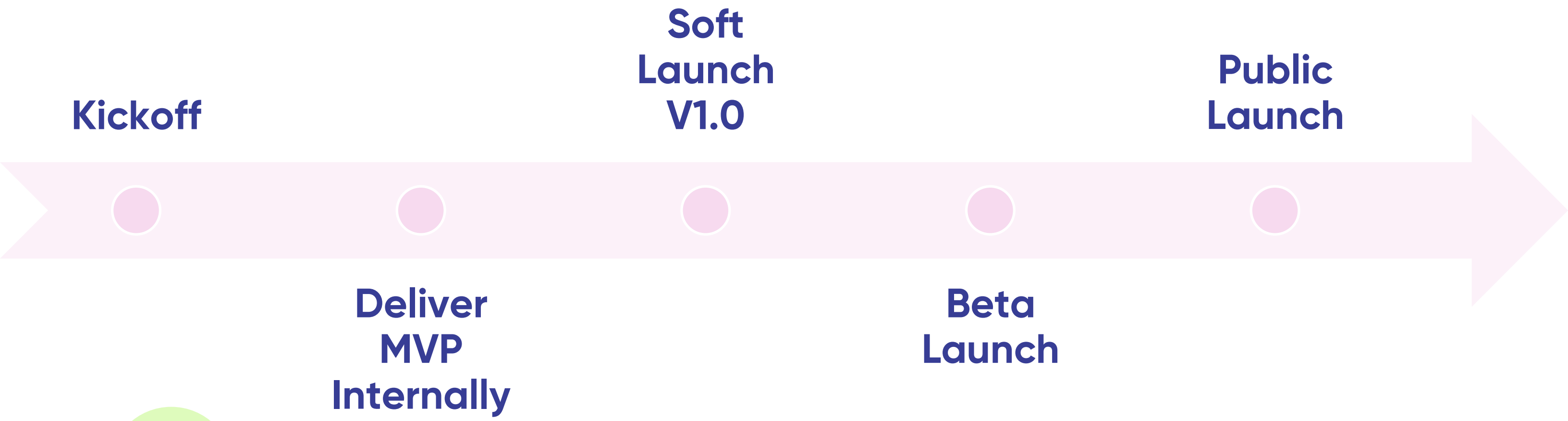
Project Milestones & Deliverables

Reference this slide throughout the project to remind key stakeholders of the expectations you had at the beginning of the project. If you can keep the milestones and deliverables to less than 10, it will help the team stay focused on the big wins.

Project Timeline

The project timeline is a more detailed visual that can be included in a kickoff deck to give the team an idea of the overall timeline of the project.

Whether you lay out sprints or display a Gantt chart for a waterfall project, this will help folks understand how you will hit your project milestones and major deliverables.



Communication Plan

Aside from the scope slide, this may be the most important slide to get right in the kickoff deck. The communication plan sets expectations for how teammates should communicate, including meeting cadence and tools (Slack, Teams, etc.) .

Project Needs

Prepare to tee up a conversation among key stakeholders around what the PM needs to deliver the project successfully. This is also a great opportunity for team members to identify potential risks or known issues that need to be watched throughout the duration of the project.

#2 Status Reports

One tell-tale sign of an experienced project manager is a well-tuned status report. Project management software platforms generally include status report templates or dashboards as well.

Regardless of the method you use to create status reports, they need to be accurate, relevant, and easy to understand. At a minimum, they should contain the following three pieces of content.

Project Status

A project status should contain a color-coded rating system to help executive leadership easily understand the status of the project (red, yellow, green work well). You should include a simple, 1-2 line summary of the project's overall status. It is also helpful to include statuses for the 5-7 biggest workflow items in-progress or on-deck.

Risks, Issues & Decisions

Identifying, documenting, and discussing key risks, issues, and decisions allows for project stakeholders to prevent major impact on project success.

Risks are the most significant potential threats to project success (which MAY happen).

Issues are the most significant items that are ACTIVELY causing the project to go off-track.

Key Decisions are any decisions by project team or leadership that may impact the project's trajectory.

Next Steps

The third key item to cover in a status report is a list of next steps. A good list will contain key activities currently underway or planned for the next few weeks. This list should also contain target delivery dates and who is responsible for completing the work.

#3 PM App / Project Plan

Project stakeholders need timely and high-quality data to make informed decisions, and as the PM, you need to establish metrics for measuring performance and protocols for collecting performance figures. The project plan is the ideal vehicle for setting expectations and establishing data collection processes.

At a minimum, the Project Plan needs a process for identifying the entire scope of work, and then decomposing the endeavor into discrete, quantifiable tasks that individual contributors can execute within a given time frame. For small business PMs, we have found that ClickUp enables exceptional levels of visibility, collaboration, and goal-tracking.

Check out how we help nonprofits use ClickUp for project management and operations

> *You can't manage what you can't measure.*
>
> **Peter Drucker**

#4 Document Repository

The document repository is more than a place to store project artifacts – it's an approach for standardizing the way artifacts are shared, stored, and consulted.

PMs can save a lot of time by establishing repeatable processes for setting up and maintaining the document repository.

Setting up a Repository

Share: Establish a “source of truth” for documentation prior to the project kick-off. Be it a ClickUp list or Channel in Microsoft Teams, make sure that every stakeholder knows where that source of truth is located.

Store: Commit to standardized document templates and file name conventions. This allows stakeholders to navigate the project’s source of truth without having to rely on the PM to guide them.

Consult: Encourage stakeholders to use the document repository instead of asking for interpretation from a colleague or simply saving documents to a local drive.

How We Use Teams

As a Microsoft partner, we use Teams for our file storage and online collaboration. Each new project gets a new Team or Channel (depending on the nature of the engagement). Each project document repository typically has the following simple folder structure:

Background Information / Received from Client – This folder is input information, such as contracts, business cases, or anything that will inform the work of the project.

Agendas & Presentations – This folder is for agendas, meeting notes, and presentations that may be referenced as part of the execution of the project. We typically store the status reports as a sub-folder.

Work in Progress – This folder houses any work that is not finalized. Using Microsoft or G-Suite to manage documents in this folder allows for multi-user collaboration and version control.

Complete – This folder houses any work that has been presented and accepted by project leadership. At the end of the project, some of these artifacts can be used as templates for future projects or copies can be placed in their final home (e.g., Maintenance & Operations Plan could be placed in the central repository for development activities).

#5 Project Closeout Checklist

A standardized and mandatory checklist of project closeout activities helps the PM ensure that all the project objectives were achieved and provides an opportunity to collect lessons learned to inform the success of future projects. Check out the next page for a sample checklist that we like to use on our projects at Tuck.

Sample Checklist

- ✓ Review Deliverable/Milestone list and confirm formal acceptance
- ✓ Conduct and document lessons learned with an action plan for future project success
- ✓ Move final artifacts to operational location
- ✓ Use final artifacts to create templates for future project use
- ✓ Confirm all invoices have been sent out and/or paid (depending on company policies)
- ✓ Ensure all individuals impacted by the project have received communications and understand how the project outcomes have impacted them
- ✓ Thank your team members
- ✓ Remove access for any individuals that no longer need system access and decommission any project assets

Let's Connect!

Tuck is dedicated to helping organizations solve problems through quality project management services. If you would like some help implementing some of the suggestions you read about, let’s find an opportunity to collaborate!

Schedule a Call

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