

# **Project Management Guide for the Non-Project Manager**

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# Introduction

If you are reading this there is a pretty good assumption that you are not a project manager. Yet you have a need (or have been tasked) to manage a project despite your lack of formal project management skills. I've been there and that is why I created these documents.

I am not trained or certified as a project manager though I have been both a manager of and a contributor to projects of all sizes and thus have learned the hard way what can work and what does not.

Now I share what I have learned (and continue to learn) with you in hope that it will ease your burden in project management.

## Defining a Project

Before we jump into the nuts and bolts, let's first define what a project is. A project is a temporary endeavor undertaken to create a unique product, service, or result. Here are some examples of projects:

- Installation of a new driveway
- Installation of a new computer system
- A mission trip to another country
- An annual community event
- Building a new structure

You may have participated in these or something similar before and not even known it was actually a project. Small businesses and volunteer organizations typically have small teams and do not employ a project manager. Instead, there may be a meeting at best to decide on an idea. Tasks are assigned on the spot and everyone hopes it works out. No single person is tracking progress, documenting technical information, or conducting a lessons learned closure meeting. This process repeats over and over again.

Sure we make it through but there are so many efficiencies that are lost along the way in repeating the same mistakes. Especially if the people involved in the last project leave the organization.

I'm here to tell you that with just a few tools, you can serve your organization to be in a better spot the next time a project comes along. I hope this helps.

## Definitions

These are some definitions to become familiar with. Not all will apply to the course of your projects but these can be helpful nonetheless. These are standard project terms that you will find useful as your endeavor to manage your next project.

**A**

- **Agile:** A flexible project management methodology emphasizing iterative progress, collaboration, and customer feedback.
- **Assumptions:** Factors considered true for project planning but not guaranteed to hold.
- **Activity:** A specific task or work element that contributes to project deliverables.

## B

- **Baseline:** The approved version of a project's plan for scope, time, and cost, used for performance comparison.
- **Budget:** The estimated financial resources required to complete a project.

## C

- **Change Management:** A structured approach to managing changes in a project.
- **Critical Path:** The sequence of project tasks determining the shortest timeline for project completion.
- **Cost Variance (CV):** The difference between the budgeted cost and the actual cost of work performed.

## D

- **Deliverable:** Any tangible or intangible output produced as part of the project.
- **Dependency:** A relationship between two tasks where one depends on the other to start or finish.

## E

- **Effort:** The amount of labor required to complete a task, often measured in hours or days.
- **Estimate:** An approximation of project costs, time, or resources.

## F

- **Float (Slack):** The amount of time a task can be delayed without affecting the project schedule.
- **Forecast:** A prediction of project outcomes based on current performance trends.

## G

- **Gantt Chart:** A visual timeline that illustrates project tasks, durations, and dependencies.
- **Governance:** The framework for decision-making, accountability, and control in a project.

## H

- **High-Level Plan:** An overview of a project's goals, milestones, and timelines.
- **Human Resources:** The personnel involved in project execution.

## I

- **Issue:** A current problem that negatively impacts the project.
- **Iteration:** A cycle in Agile project management focused on delivering a working product increment.

## K

- **Key Performance Indicator (KPI):** A measurable value indicating project success against objectives.

## L

- **Lessons Learned:** Documented experiences from a project, used to improve future performance.

## M

- **Milestone:** A significant event or point in a project timeline.
- **Matrix Organization:** A structure where team members report to multiple leaders, typically project and functional managers.

## P

- **Project Charter:** A document formally authorizing a project and outlining its objectives, stakeholders, and scope.
- **Project Scope:** The work required to deliver the project's product or service.

## R

- **Risk:** An uncertain event or condition that could affect project objectives.
- **Resource Allocation:** Assigning available resources to tasks in a project.

## S

- **Scope Creep:** Uncontrolled changes or growth in a project's scope.
- **Stakeholder:** Any person or group affected by or involved in a project.

## T

- **Task:** A smaller, manageable unit of work in a project.
- **Timeline:** A schedule outlining the start and finish dates of project tasks.

## V

- **Variance:** The difference between planned and actual project performance.
- **Vendor:** An external provider of goods or services for the project.

## W

- **Work Breakdown Structure (WBS):** A hierarchical decomposition of a project into smaller, manageable components.
- **Workflow:** The sequence of steps to complete a process or task.

## Project Phases

We will break the project lifecycle down into five phases. Each phase corresponds to the project plan workbook. Before we do, let's talk briefly about how a project should or could be requested.

## Project Requests

Projects should be formally request either by electronic form or a paper document. I have included a project request template for your use. The request form asks key questions which will set you up for success in the creation of the charter as well as the brainstorm meeting. Your organization should

announce the use of the form to its employees and members with instruction as to how the form should be sent and how it will be received and processed.

Your organization may choose to process the forms monthly during board meetings or during a separate project review meeting. Once a project request has been received and accepted we can move into the first phase, initiation.

## 1. Initiation

This phase focuses on defining the project at a high level. The goal is to determine whether the project is feasible and worth pursuing.

Key Activities:

- **Develop a Business Case:** Define the project's purpose, value, and expected benefits.
- **Create a Project Charter:** Formally authorize the project, including objectives, scope, stakeholders, and high-level timeline.
- **Identify Stakeholders:** Determine who will be involved or affected by the project.
- **Feasibility Study:** Assess technical, financial, and resource viability.

Outcome: A clear understanding of project goals and a formal go/no-go decision.

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## 2. Governance

This ongoing phase ensures the project aligns with organizational goals and is executed responsibly. Governance acts as a decision-making framework for oversight and accountability.

Key Activities:

- **Define Roles and Responsibilities:** Identify decision-makers, stakeholders, and accountability structures.
- **Establish Policies and Procedures:** Set rules for managing scope, risks, quality, and changes.
- **Monitor Compliance:** Ensure adherence to standards, budgets, and timelines.
- **Hold Steering Committee Meetings:** Facilitate key decision-making at critical milestones.

Outcome: Transparent processes that support successful project delivery within constraints.

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## 3. Procurement

This phase involves acquiring external goods, services, or resources necessary for project execution. It often overlaps with the planning or implementation phases.

Key Activities:

- **Define Procurement Needs:** Identify what must be sourced externally (e.g., vendors, tools, materials).
- **Request for Proposals (RFPs):** Invite bids from suppliers or contractors.
- **Select Vendors:** Evaluate bids based on cost, capability, and alignment with project needs.
- **Negotiate Contracts:** Finalize agreements, including deliverables, payment terms, and timelines.
- **Vendor Management:** Ensure suppliers meet expectations during the project.

Outcome: All required resources and services are secured under clear terms.

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## 4. Implementation

This is the execution phase, where project plans are put into action to deliver the intended outcome.

Key Activities:

- **Task Assignments:** Allocate tasks to team members based on the project plan.
- **Monitor Progress:** Track performance using tools like Gantt charts, status reports, and KPIs.
- **Risk and Issue Management:** Address challenges and deviations proactively.
- **Stakeholder Communication:** Keep all parties informed through updates and reviews.
- **Quality Assurance:** Verify deliverables meet standards through testing and reviews.

Outcome: Deliverables are produced, progress is tracked, and adjustments are made as needed.

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## 5. Closure

This final phase ensures all project objectives are met, deliverables are handed over, and lessons learned are documented.

Key Activities:

- **Finalize Deliverables:** Ensure outputs meet quality standards and fulfill objectives.
- **Handover:** Transfer completed deliverables to clients or operational teams.
- **Evaluate Performance:** Compare actual outcomes to objectives, timelines, and budgets.
- **Conduct a Lessons Learned Review:** Identify successes, challenges, and opportunities for improvement.
- **Close Contracts:** Ensure all vendor obligations are fulfilled and settled.
- **Celebrate Success:** Recognize the team's efforts and achievements.

Outcome: The project is officially closed, and insights are captured for future projects.

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## Templates

The following sections are templates of documents and meetings in the management process.

### 1. Initiation Templates

- **Project Charter Template:**
    - Overview: Project purpose, objectives, scope, and high-level timeline.
    - Sections: Project background, deliverables, stakeholders, risks, and approval signatures.
  - **Feasibility Study Template:**
    - Overview: Assessment of technical, financial, and resource viability.
    - Sections: Executive summary, cost-benefit analysis, risk assessment, and recommendations.
  - **Stakeholder Identification Template:**
    - Overview: A tool to document stakeholder roles, interests, and influence.
    - Sections: Name, role, impact, level of influence, and engagement strategy.
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### 2. Governance Templates

- **Project Governance Plan Template:**
    - Overview: Defines decision-making processes and accountability.
    - Sections: Governance structure, roles/responsibilities, meeting schedules, and reporting protocols.
  - **Steering Committee Meeting Agenda Template:**
    - Overview: Outline for regular project oversight meetings.
    - Sections: Objectives, agenda items, decisions to be made, and action items.
  - **Risk Management Plan Template:**
    - Overview: Framework for identifying, assessing, and mitigating risks.
    - Sections: Risk identification, impact assessment, mitigation strategies, and contingency plans.
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### 3. Procurement Templates

- **Request for Proposal (RFP) Template:**
    - Overview: Document to invite vendor bids for goods/services.
    - Sections: Background, scope of work, deliverables, submission guidelines, and evaluation criteria.
  - **Vendor Evaluation Scorecard Template:**
    - Overview: Tool to compare and rank vendor proposals.
    - Sections: Criteria (e.g., cost, experience, technical capability), scoring system, and total scores.
  - **Procurement Contract Template:**
    - Overview: Legal agreement outlining deliverables, timelines, and payment terms.
    - Sections: Scope, deliverables, terms and conditions, penalties, and termination clauses.
- 

### 4. Implementation Templates

- **Project Plan Template:**
    - Overview: Detailed roadmap for execution.
    - Sections: Tasks, timelines, dependencies, resources, and milestones.
  - **Progress Report Template:**
    - Overview: Regular updates on project performance.
    - Sections: Overview, key accomplishments, risks/issues, upcoming tasks, and status summary.
  - **Risk Log Template:**
    - Overview: Tracks risks throughout execution.
    - Sections: Risk description, likelihood, impact, owner, and status.
  - **Change Request Form Template:**
    - Overview: Formal process for requesting scope or schedule changes.
    - Sections: Change description, justification, impact assessment, and approval.
- 

### 5. Closure Templates

- **Project Closure Report Template:**
  - Overview: Summarizes the project's outcomes and achievements.
  - Sections: Objectives achieved, final deliverables, budget performance, and stakeholder feedback.

- **Lessons Learned Template:**
    - Overview: Captures insights for future projects.
    - Sections: Successes, challenges, what went well, what didn't, and recommendations.
  - **Handover Document Template:**
    - Overview: Ensures a smooth transition of deliverables.
    - Sections: Deliverable description, ownership, operational guidelines, and maintenance plans.
  - **Team Acknowledgment and Feedback Template:**
    - Overview: Collects team feedback and recognizes their contributions.
    - Sections: Reflections, feedback on management, and suggestions for future projects.
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## The RACI Matrix and Its Use

A **RACI matrix** is a project management tool used to define and document the roles and responsibilities of individuals or teams for specific tasks, deliverables, or decisions within a project. The acronym RACI stands for **Responsible**, **Accountable**, **Consulted**, and **Informed**, and each represents a specific type of involvement in the project. By clearly outlining these roles, the RACI matrix improves communication, reduces confusion, and ensures accountability throughout the project's lifecycle.

### Key Components of a RACI Matrix

#### 1. Responsible (R)

- The person or team who performs the task or does the work.
- They are directly involved in executing and completing the activity.
- There can be multiple individuals in this role for a task.

#### 2. Accountable (A)

- The person ultimately answerable for the task or deliverable.
- They ensure that the work gets completed and meet quality standards.
- There must always be one and only one accountable person per task to avoid ambiguity.

#### 3. Consulted (C)

- Individuals or teams who provide input, feedback, or expertise during the process.
- They are consulted before decisions are made or work is finalized.
- Communication with this group is bi-directional.

#### 4. Informed (I)

- Stakeholders who need to be kept updated on the progress or outcomes of a task.

- They are not directly involved in the work but are informed after decisions or key actions.
- Communication with this group is one-way.

## How to Create a RACI Matrix

### 1. List Tasks or Deliverables

- Start by identifying all the tasks, activities, or deliverables in the project.
- These are typically listed in rows on the matrix.

### 2. Identify Roles or Team Members

- List all individuals, teams, or stakeholder groups involved in the project.
- These are usually listed in columns at the top of the matrix.

### 3. Assign RACI Roles

- For each task, assign one or more of the RACI roles to the relevant individuals or teams.
- Ensure there is only one accountable (A) role per task, while other roles (R, C, I) can be shared if necessary.

### 4. Validate and Finalize the Matrix

- Review the matrix with the team to ensure everyone understands their responsibilities.
- Confirm alignment with stakeholders to prevent overlaps, gaps, or miscommunication.

## When to Use a RACI Matrix

A RACI matrix is especially useful in the following scenarios:

- **Complex Projects:** When multiple teams or stakeholders are involved, the RACI matrix helps ensure clarity about who is responsible for what.
- **Role Clarification:** To avoid duplication of effort or overlooked tasks, the matrix clearly defines roles and expectations.
- **Decision-Making Processes:** By identifying consulted and informed roles, it streamlines who needs to be included in discussions or updated.
- **Team Alignment:** When on-boarding new team members or restructuring teams, the RACI matrix acts as a reference for responsibilities.

## Benefits of Using a RACI Matrix

### 1. Clarity and Accountability

- Everyone knows their role and responsibilities, preventing confusion or overlapping duties.

### 2. Improved Communication

- Stakeholders understand when they will be consulted or informed, reducing unnecessary updates or bottlenecks.

### 3. Streamlined Decision-Making

- Clearly identifies who makes decisions and who needs to provide input, making processes more efficient.

### 4. Conflict Resolution

- Helps resolve disputes by clearly documenting roles and responsibilities.

### 5. Enhanced Project Efficiency

- Prevents delays caused by role ambiguity and ensures that work progresses smoothly.

## Example of a RACI Matrix

Task/Activity	Team Lead	Designer	Developer	QA Tester	Client
Define Requirements	A	C	I	I	C
Design Prototype	I	R/A	C	I	C
Develop Features	I	C	R/A	I	I
Test and Validate	I	I	C	R/A	C
Approve Final Work	I	I	I	I	A

## Tips for Effective Use of a RACI Matrix

- **Keep It Simple:** Avoid over-complicating the matrix; focus on the key roles and tasks.
- **Review Regularly:** Update the matrix as the project evolves to reflect changes in scope or responsibilities.
- **Ensure Accountability:** Assign one accountable role per task to avoid confusion over decision-making.
- **Communicate Clearly:** Share the finalized matrix with all stakeholders and ensure they understand their roles.

A RACI matrix is a powerful yet straightforward tool that fosters clarity, collaboration, and efficiency. By defining roles clearly, it empowers teams to work cohesively, achieve objectives, and deliver successful projects.