



**Project Management for the Busy Professional
Getting it Done with Limited Time and Resources
Part 1: What to do and by when**

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Maximizing Social Impact

Capturing Projects – Work Streams

Your role comprises a few general categories of work.

We'll call these categories “Work Streams.”

Within your “Work Streams” are things you must do.

We'll call these things “Projects.”

Capturing Projects – Work Streams

Melissa

Executive Director

- Programming
- Fundraising
- Administration

Taylor

Comms Manager

- Website
- Marketing pieces
- Email

Brian

Program Director

- Outdoor Courses
- Scholarship Program
- Safety Trainings

Alex

Office Manager

- Control Correspondence
- Accounts Payable
- Manage Supply Inventory

Capturing Projects – Work Streams

So what's your job? Think about what you have been hired to accomplish.

Let's identify your Work Streams.

Capturing Projects – Work Streams

What are the few general categories of work that comprise your job?

Work Streams (Buckets)

A. _____

B. _____

C. _____

D. _____

E. _____

F. _____

Capturing Projects – Examples

Now let's think about your “Projects.”

Within your “Work Streams” are things you must do.

We'll call these things “Projects.”

Capturing Projects – Examples

Examples:

Executive Director

- Programming
- Fundraising
- Administration

Melissa's Work Streams and Projects

Programming	Fundraising	Administration
Daily soup kitchen	Old Bill's	Monthly Budget Report
Daily Meals on wheels	Annual Banquet Dinner	Annual Staff Retreat
Quarterly Food Drive	Giving Tuesday	Board Recruitment

Capturing Projects – Examples

Examples:

Comms Manager

- Website
- Marketing pieces
- Email

Taylor's Work Streams and Projects

Website	Marketing Pieces	Email
Launch new website	Create new SWAG product	Quarterly Newsletter
Create micro-page for donations	Annual Report	Old Bill's
Update client pictures	Inspirational Video	Select and launch new application

Capturing Projects – Examples

Examples:

Program Director

- Outdoor Courses
- Scholarship Program
- Safety Trainings

Brian's Work Streams
and Projects

Outdoor Courses	Scholarship Program	Safety Trainings
Treeline Trial Challenge Course	Outward Bound Partnership	Park Ranger Training Course
Annual 4 th Graders Geology Hike	The Wonder Institute Partnership	Avalanche Hazard Safety Series
Summer Camp Leadership Institute	Girl Scouts of America Partnership	Weekly Wilderness First Aid for kids

Capturing Projects – Examples

Examples:

Office Manager

- Manage Supply Inventory
- Accounts Payable
- Control Correspondence

Alex's Work Streams and Projects

Manage Supply Inventory	Accounts Payable and Receivable	Control Correspondence
Monitor tech equipment	Manage vendor tax and contact info	Receive, sort, and distribute mail
Purchase supplies requested by staff	Send checks to vendors	Scan and upload development docs
Monitor levels of office supplies	Process deposits and inform staff	Process and distribute packages

Capturing Projects

Considering your Work Streams, what are the things you must do to be successful.

Those are your projects.

Capturing Projects

STEP 1: Identify your projects.

	Work Stream A	Work Stream B	Work Stream C
Project			
Project			

Capturing Projects – Examples

Within your “Work Streams” are things you must do.

We’ll call these things “Projects.”

Within each of your “Projects” are small mini-projects you must do to complete the projects.

We call these mini-projects “Tasks.”

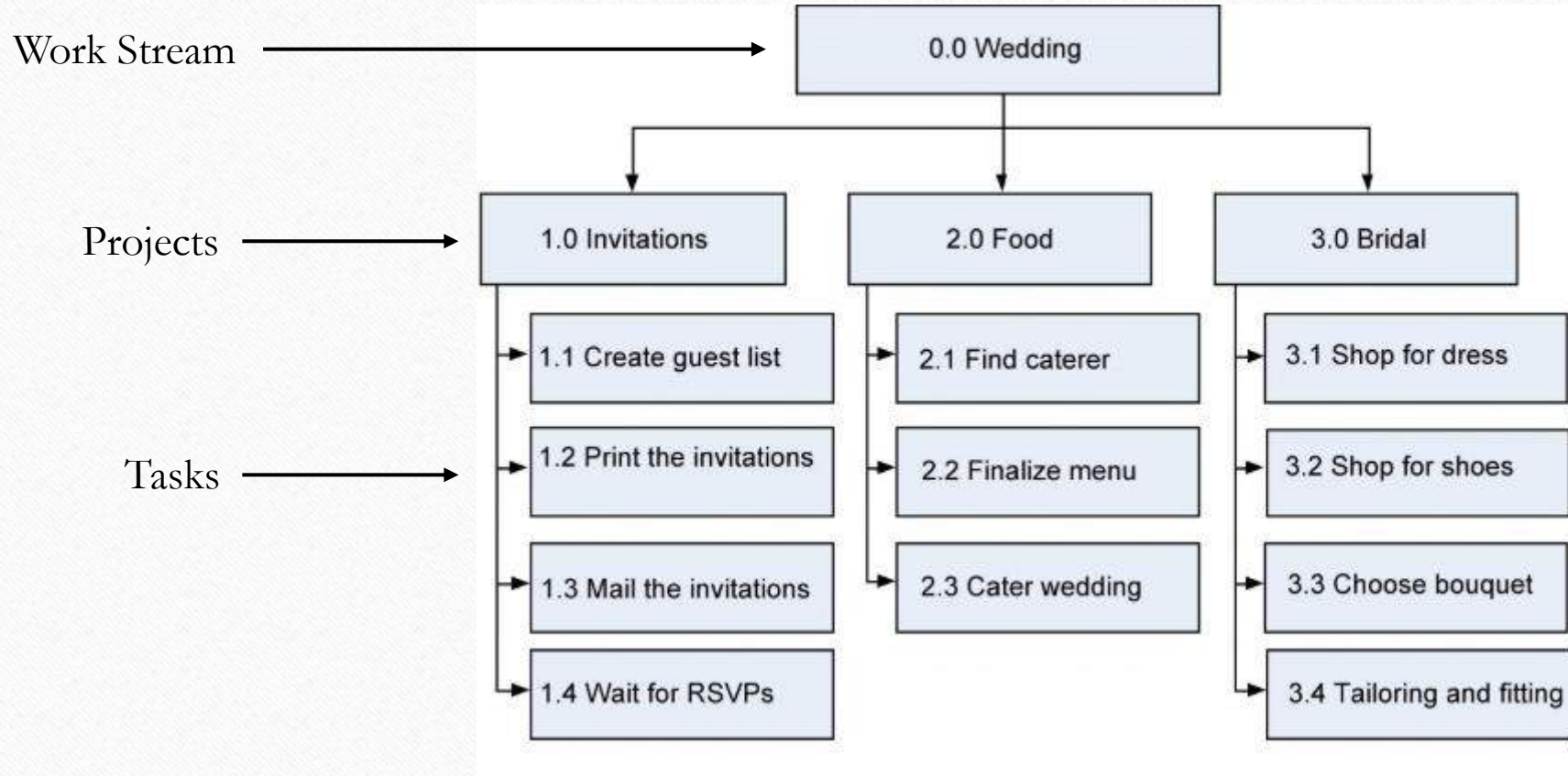
Identifying Tasks

STEP 2: Identify your tasks.

What does it mean to “identify the tasks?”

- Break down the project into smaller, manageable pieces – not too big, not too small.
- One sentence or phrase.
- Each task must have a concrete, measurable deliverable. You need to be able to check a “done” box. (Tasks are “to-dos,” not “how to-dos.”)
- Think of projects as a collection of deliverables.

Identifying Tasks - Example

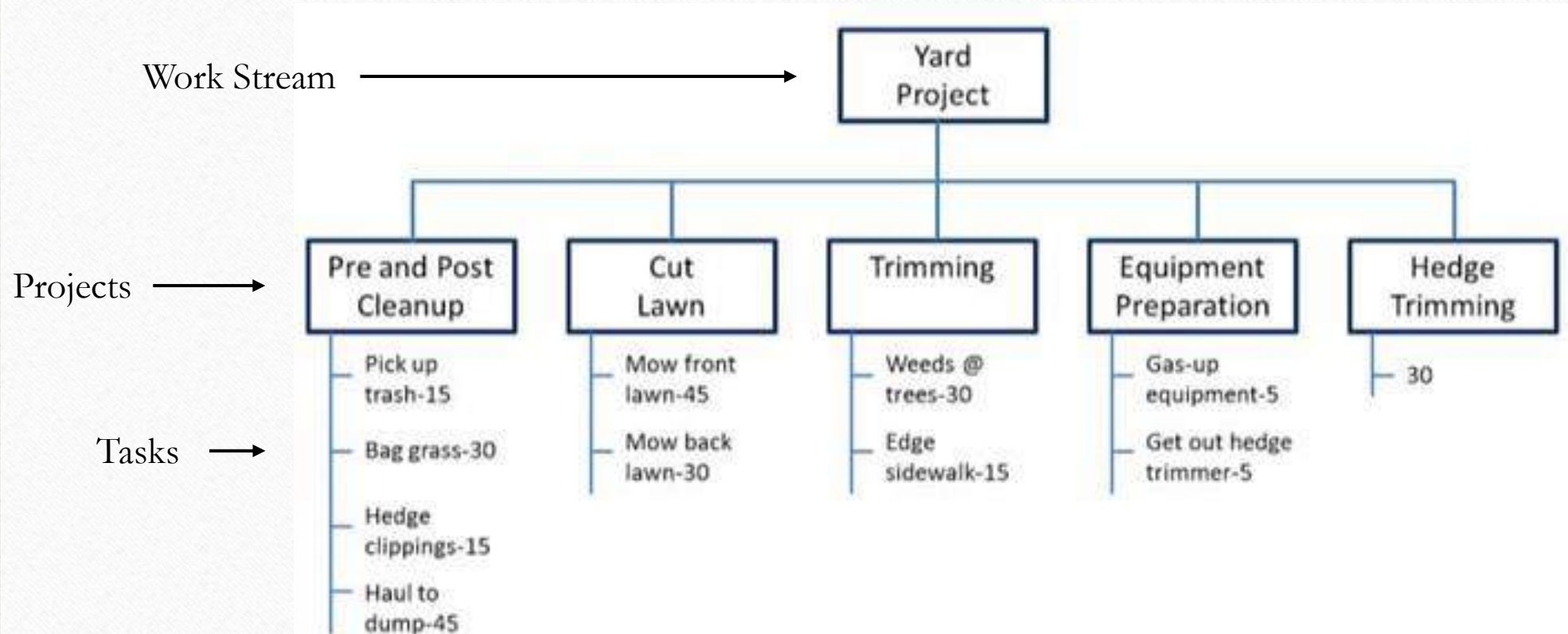


Identifying Tasks

So, what are the tasks? How do you identify tasks?

- Have you done this project before? If so, recall each step.
- Have you done something similar to this project before? If so, brainstorm the steps you took in the past.
- Phone a friend. Meet with an expert who has done this type of project before and pick their brain.
- Consult the internet. See what steps other people have taken to complete your project.
- Thought-partner. Talk it through with someone in a similar role.
- White-board. Walk through it on your own.

Identifying Tasks - Example



Identifying Tasks – Group Exercise

- Join your Breakout Group.
- Each group will discuss one of the project examples.
- In your groups, spend time brainstorming the tasks (deliverables) for your assigned project.

Melissa, ED

Annual Banquet
Dinner

Taylor, Comms

Quarterly
Newsletter

Brian, Program
Director

Annual 4th Graders
Leadership Hike

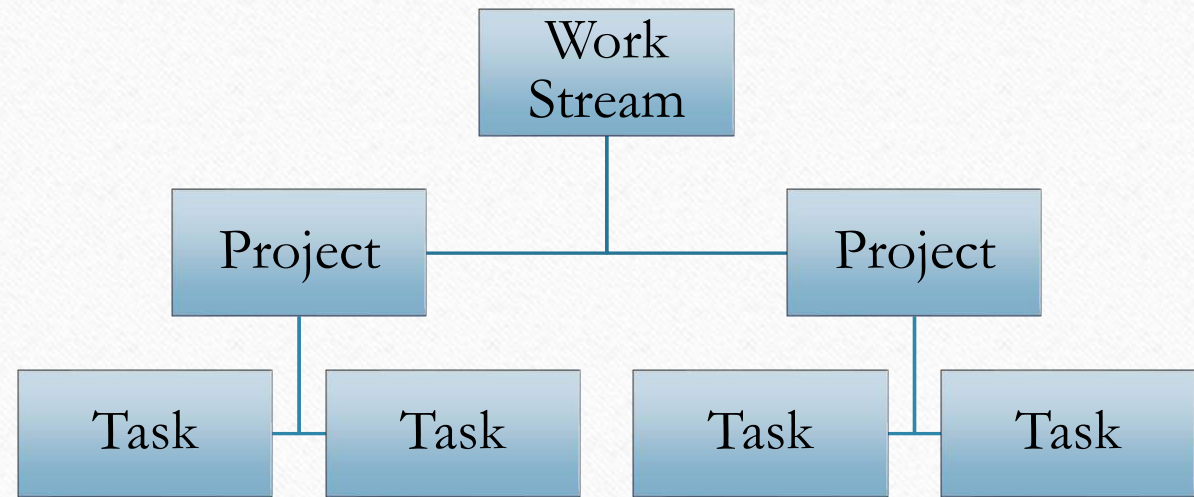
Alex, Office
Manager

Purchase supplies
requested by staff



Identifying Tasks – Back at the Office

- Grab a stack of post-its.
- On your paper or a wall, identify your projects.
- Under each project, identify the tasks.



Easy Product Management Software

- Word
- Excel
- Gantt Chart
- Planio
- Trello
- Asana
- Base Camp
- White boards on your wall



Thank you for your participation today!!!

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