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

Andrea Somerville, Somerville Consulting Firm
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

<table>
<thead>
<tr>
<th>Melissa</th>
<th>Executive Director</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Programming</td>
</tr>
<tr>
<td></td>
<td>• Fundraising</td>
</tr>
<tr>
<td></td>
<td>• Administration</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Comms Manager</th>
<th>Taylor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Website</td>
</tr>
<tr>
<td></td>
<td>• Marketing pieces</td>
</tr>
<tr>
<td></td>
<td>• Email</td>
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<th>Brian</th>
<th>Program Director</th>
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<td>• Outdoor Courses</td>
</tr>
<tr>
<td></td>
<td>• Scholarship Program</td>
</tr>
<tr>
<td></td>
<td>• Safety Trainings</td>
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<tr>
<th>Office Manager</th>
<th>Alex</th>
</tr>
</thead>
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<tr>
<td></td>
<td>• Control Correspondence</td>
</tr>
<tr>
<td></td>
<td>• Accounts Payable</td>
</tr>
<tr>
<td></td>
<td>• Manage Supply Inventory</td>
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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

<table>
<thead>
<tr>
<th>Programming</th>
<th>Fundraising</th>
<th>Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily soup kitchen</td>
<td>Old Bill’s</td>
<td>Monthly Budget Report</td>
</tr>
<tr>
<td>Daily Meals on wheels</td>
<td>Annual Banquet Dinner</td>
<td>Annual Staff Retreat</td>
</tr>
<tr>
<td>Quarterly Food Drive</td>
<td>Giving Tuesday</td>
<td>Board Recruitment</td>
</tr>
</tbody>
</table>
Capturing Projects – Examples

Examples:

Comms Manager

- Website
- Marketing pieces
- Email

Taylor’s Work Streams and Projects

<table>
<thead>
<tr>
<th>Website</th>
<th>Marketing Pieces</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launch new website</td>
<td>Create new SWAG product</td>
<td>Quarterly Newsletter</td>
</tr>
<tr>
<td>Create micro-page for donations</td>
<td>Annual Report</td>
<td>Old Bill’s</td>
</tr>
<tr>
<td>Update client pictures</td>
<td>Inspirational Video</td>
<td>Select and launch new application</td>
</tr>
</tbody>
</table>
Capturing Projects – Examples

Examples:

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

Brian’s Work Streams and Projects
Capturing Projects – Examples

Examples:

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

Office Manager
- Manage Supply Inventory
- Accounts Payable
- Control Correspondence

Alex’s Work Streams and Projects
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.

<table>
<thead>
<tr>
<th>Project</th>
<th>Work Stream A</th>
<th>Work Stream B</th>
<th>Work Stream C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
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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

Work Stream

Projects

Tasks

- 1.0 Invitations
  - 1.1 Create guest list
  - 1.2 Print the invitations
  - 1.3 Mail the invitations
  - 1.4 Wait for RSVPs

- 2.0 Food
  - 2.1 Find caterer
  - 2.2 Finalize menu
  - 2.3 Cater wedding

- 3.0 Bridal
  - 3.1 Shop for dress
  - 3.2 Shop for shoes
  - 3.3 Choose bouquet
  - 3.4 Tailoring and fitting
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

- Work Stream
  - Projects
    - Tasks

Flowchart:
- Yard Project
  - Pre and Post Cleanup
    - Pick up trash-15
    - Bag grass-30
    - Hedge clippings-15
    - Haul to dump-45
  - Cut Lawn
    - Mow front lawn-45
    - Mow back lawn-30
  - Trimming
    - Weeds @ trees-30
    - Edge sidewalk-15
  - Equipment Preparation
    - Gas-up equipment-5
    - Get out hedge trimmer-5
  - Hedge Trimming
    - 30
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.

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<td>Purchase supplies requested by staff</td>
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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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