



TAG, YOU'RE IT!

PROJECT MANAGEMENT

**FOR THE INCIDENTAL PROJECT
MANAGER**

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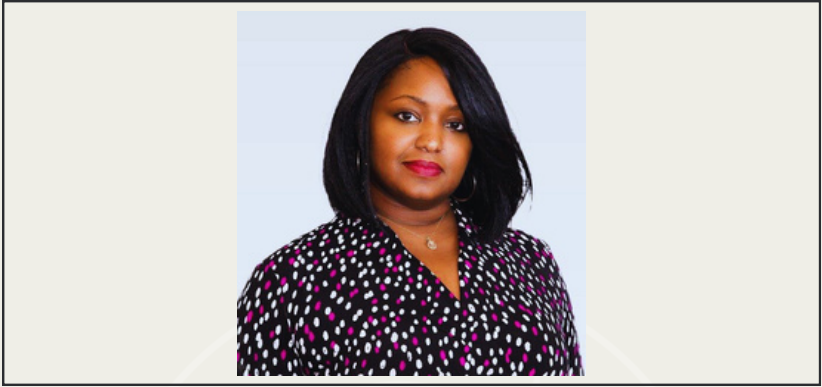
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ABOUT THE AUTHOR



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I'm Teresa Durham, certified Project Management Professional (PMP), Scrum Master (CSM), and owner of Sabbatical Life, LLC and Teresa Durham, LLC. I've spent well over 20 years performing project management for various types of projects across many different industries. After a transformative sabbatical in 2022, I decided to start my own business. I wanted to empower change-challenged organizations to meet their goals through project management, process improvement, and business operations management. I am passionate about helping people to make their lives easier and better and having my own company allows me to have a more personal relationship with my clients and cater specifically to their needs. I provide project management training and coaching to practitioners as well. I enjoy helping others and I often do it with a little humor. After all, life is short - why be so serious all the time?

If you're seeking a seasoned professional who can bridge the gap between big-picture strategy and meticulous execution or a project management coach to help with your PM career or just a lifeline for those especially challenging project dilemmas, look no further. Simply set up a discovery call on my website, <https://teresadurham.com> and let's discuss your needs.

INTRODUCTION

SURPRISE! YOU'VE JUST BEEN TOLD YOU'RE LEADING THIS PROJECT! SAY WHAT? WHO PUT YOUR NAME IN THE POT? DON'T WORRY, I'VE GOT YOU COVERED.

Have you ever been assigned a project management role, even though it's not your primary job function? Maybe you're a subject matter expert or a team lead, and suddenly you find yourself responsible for ensuring a project's success. You, my friend, have just become an incidental project manager. This scenario is all too common in today's workplace, where businesses are under increasing pressure to deliver projects on time, within budget, and to a high standard of quality.

Of course, there is always the option of hiring a professional project manager, like me - but wait! Your company chose you! Now don't take it lightly. The role of an incidental project manager can be challenging, especially if you don't have a formal background in project management. You may feel overwhelmed and uncertain about where to start. That's where this guide comes in.

I'm going to take you on a wild trip through the world of project management! Well, it's really not that wild. It's pretty practical, to be honest. In just 15 short chapters, I'll cover all the basics you need to know, from scoping and planning to budgeting and risk management. We'll also provide tips for managing your team and stakeholders effectively, so you can keep your project on track and deliver results that meet or even exceed expectations.

INTRODUCTION

So look, I know you didn't sign up for this role, it just kind of happened. Or maybe you volunteered for a project without realizing the full extent of what you were getting into. Either way, you're in it now, and you're going to make the best of it.

Remember, you're not alone, and with this guide, you'll have everything you need to successfully navigate your projects and achieve your goals. And hey, you can always reach out to me if you need coaching or a lifeline.

So, if you're ready to blow somebody's socks off with your newly achieved project management skills, buckle up and let's go!



CHAPTER 1

"WAIT, WHAT? I'M A PROJECT MANAGER NOW?"

Congratulations! You just found out that you're the new project manager for a big project. How exciting, right? Except, you've never managed a project before. Panic sets in. What are you going to do?

Don't worry, you're not alone. Many people find themselves in the same situation. Maybe your boss needed someone to take on a project at the last minute, or maybe you volunteered without realizing what you were getting into. Regardless of how you got here, the fact is that you're the project manager now, and you're going to make the best of it. Right?

In this chapter, I'll cover the basics of project management and help you understand what you've gotten yourself into. I'll define what a project is, and explain the different roles and responsibilities of a project manager. We'll also explore the characteristics of successful project managers and provide tips on how to be an effective leader.

At this point, you might feel like you're in over your head, but remember that you were chosen for this role for a reason. You have skills and qualities that make you a valuable asset to the project team. With a little guidance, the right mindset, and a lot of determination, you'll be able to successfully manage your project and deliver results that make you proud.

So, take a deep breath, Mr. or Ms. Incidental Project Manager, and let's jump right into some project management!

In the next chapter, we'll dive into the basics of project management and explore the different phases of a project.



CHAPTER 2

"PROJECT MANAGEMENT 101: THE BASICS YOU NEED TO KNOW"

So, let's clarify some things in the beginning. It is important to be clear about the basics so you don't find yourself in a mess, masquerading as a project. It happens all the time. You've heard of projects that never end? No such thing. I call that "a mess". But I will spare you my rant about the things people call projects, so I digress.

First, let's define what a project is. A project is a temporary endeavor with a specific goal or objective. It has a defined beginning and end, and it requires a unique set of resources to accomplish. Note "temporary", "specific objective", and "defined beginning and end". If it doesn't pass this test, it is not a project.

As a project manager, your role is to lead the project team and ensure that the project is completed on time, within budget, and to the satisfaction of stakeholders. To do this effectively, you need to understand the different phases of a project and the activities that occur during each phase.

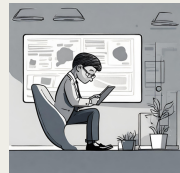
The typical phases of a project include:

- **Initiation:** During this phase, the project is defined and the goals and objectives are established. The project manager also identifies stakeholders and determines the resources required to complete the project.
- **Planning:** In this phase, the project manager develops a project plan that outlines the activities required to achieve the project goals. This includes developing a project schedule, budget, and identifying risks.
- **Execution:** This is the phase where the actual work of the project is completed. The project team performs the activities outlined in the project plan and the project manager monitors progress to ensure that the project stays on track.
- **Monitoring and Controlling:** In this phase, the project manager tracks progress, identifies any deviations from the project plan, and takes corrective action if necessary.

CHAPTER 2

- **Closure:** The final phase of the project involves delivering the final product or service to the customer and closing out the project.

As an incidental project manager, it's important to understand these phases and the activities that occur during each phase. This will help you develop a project plan and keep the project on track. In the next chapter, we'll dive deeper into the first phase of a project - initiation - and explore how to define project scope and establish project goals.



CHAPTER 3

IDENTIFYING AND DEFINING PROJECT SCOPE: THE ART OF HERDING CATS

The initiation phase is the first step in any project, and it's where the foundation for the entire project is established. During this phase, you'll define the project scope and establish the goals and objectives that the project will achieve. This may sound like a simple task, but it's actually quite challenging.

Why? Because it's like herding cats.

Just think about it. You have all these different stakeholders with all their own needs and wants. And they all want something different. Some want the project to be done quickly, while others want it to be done perfectly. Some want it to be cheap, while others want it to be high-quality. And it's your job to figure out how to make all of these stakeholders happy. No pressure, right?

Defining the project scope is critical to the success of the project.

The scope outlines what the project will and will not accomplish. This includes the deliverables that will be produced, the resources required, and any constraints or limitations that the project team will need to work within. It's important to establish the scope early in the project, as changes to the scope later on can be costly and impact the project schedule.

To define the project scope, you'll need to work closely with stakeholders to understand their needs and expectations. This can include conducting interviews, surveys, and focus groups to gather information.

You'll also need to identify any assumptions and constraints that will impact the project scope.

Once the project scope is defined, you can move on to establishing the goals and objectives that the project will achieve.

CHAPTER 3

The goals should be specific, measurable, achievable, relevant, and time-bound (SMART). This will help ensure that the project is aligned with the needs of stakeholders and that progress can be tracked throughout the project lifecycle.

Are you panicking? No need. I'm here to help.

Here are a few tips for identifying and defining the scope of your project:

1. Start by understanding the project's goals and objectives. What do you want to achieve with this project? What are the key deliverables?
2. Identify the stakeholders and their needs. Who will be affected by this project? What do they want to see happen?
3. Define the project's boundaries. What is included in the project? What is not included?
4. Document the scope statement. This is a formal document that outlines the project's scope.
5. Get agreement from all stakeholders. Make sure everyone is on the same page about the project's scope.
6. Review the scope statement regularly. As the project progresses, the scope may need to be adjusted.

A bonus tip I'd like to add here is to have the scope statement or document signed by the sponsor of the project. The project sponsor is the senior manager ultimately responsible for the success of the project. This is often the person footing the bill. People change their minds and forget things. Getting the signature once the scope is defined helps you to manage the project and make decisions down the road in addition to providing some protection regarding what the objective of the project was when you began.

As an incidental project manager, it's important to work closely with stakeholders during the initiation phase to ensure that the project scope and goals are clearly defined. This will help set the project up for success and avoid any misunderstandings later on.

Feeling better about the cats? Don't try to make everyone happy. It's not possible. Focus on the sponsor and be as clear as possible with the goals and objectives in your documentation and once signed, share it with your stakeholders. You'll thank yourself later.

In the next chapter, we'll dive deeper into the planning phase and explore how to develop a project plan that outlines the activities required to achieve the project goals.

CHAPTER 4

DEVELOPING A PROJECT PLAN: BECAUSE 'WINGING IT' JUST ISN'T AN OPTION

Ah, the joys of winging it. Sure, it might work for some things in life, like deciding what to have for dinner or which movie to watch. But when it comes to project management, winging it just isn't an option. You've heard the saying, "If you fail to plan, you plan to fail." Don't skip this part. It is very important for you, your team and your stakeholders.

A project plan is a document that outlines the project's goals, objectives, deliverables, schedule, budget, and resources. It's like a road map for the project, and it helps to ensure that everyone is on the same page.

There are many different ways to develop a project plan. Some people prefer to use a formal project management methodology, while others prefer to take a more informal approach. The best approach for you will depend on the size and complexity of your project.

No matter what approach you take, there are some key things that all project plans should include:

- **Project goals and objectives.** What do you want to achieve with this project?
- **Deliverables.** What tangible items will be produced by the project?
- **Schedule.** When will each deliverable be completed?
- **Budget.** How much will the project cost?
- **Resources.** What resources will be needed to complete the project?

Here are some tips for developing your project plan:

- **Start by identifying the goals and objectives of the project:** You must know what the ultimate goal is otherwise you will wind up in a never-ending project and that's not what you want. Use your scope statement here.

- **Break the project down into manageable tasks:** Just as it is written. Breaking the project down into smaller, more manageable tasks that can be tracked and completed by the project team.
- **Estimate the time and resources required:** Once you've identified the tasks, you'll need to estimate the time and resources required to complete each task. This includes identifying the people, equipment, and materials needed to complete the work.
- **Develop a project schedule:** Based on the estimated time and resources required, you can develop a project schedule that outlines when each task will be completed. This will help ensure that the project stays on track and that deadlines are met. Consider resource availability, dependencies, and tasks that can be done concurrently as you develop the schedule.
- **Identify risks and develop a risk management plan:** It's important to identify any risks that could impact the project and develop a plan to mitigate those risks.
- **Develop a budget:** The project budget outlines the costs associated with completing the project. This includes the cost of labor, materials, and any other expenses related to the project.
- **Communicate the project plan to all of your stakeholders:** This communication helps to set expectations. Communication is very key in every phase of the project. Be clear, concise and consistent.
- **Review and update the project plan regularly:** Things will change, especially if your project takes place over several months or years. Keep your plan up to date. Again, communicate, communicate, communicate.

Another bonus tip here is to create a process for changes. Document the changes and get signatures to make sure everyone is in agreement and understands the changes and the impact the changes will have on the project. Consider these signatures as insurance and confirmation that you are guiding the team in the right direction.

By following these tips, you can develop a project plan that will help you to achieve your goals and objectives.

And remember, winging it just isn't an option if you want to succeed.

CHAPTER 5

"ESTIMATING AND MANAGING PROJECT BUDGETS: HOW TO MAKE EVERY PENNY COUNT"

Money makes the world go 'round, and it certainly makes projects go 'Bling, Bling! You've made it to the budgeting phase of your project, and now it's time to make every penny count. As an incidental project manager, you may not have extensive experience with budgeting, but fear not, for this chapter will simplify it for you.

The first step in managing your project budget is to estimate the costs of all the resources you'll need. This includes everything from personnel costs to equipment, software, and materials. Don't forget to factor in any contingencies or unexpected expenses that may arise during the project. Remember, it's always better to overestimate than to underestimate.

Once you've estimated your costs, it's time to create a budget. This is where you'll allocate funds to each aspect of your project.

Keep in mind that your budget should be flexible enough to accommodate any changes that may occur throughout the project. It's also important to track your spending and adjust your budget accordingly.

Effective budget management requires clear communication and collaboration with your team. Make sure everyone is aware of the budget and their role in managing it. Consider delegating budget responsibilities to team members with relevant expertise to ensure accuracy and transparency.

Another essential aspect of budget management is controlling costs. This means avoiding unnecessary expenses and finding ways to save money without compromising quality. Encourage your team to think creatively and come up with cost-saving solutions.

Finally, don't forget to factor in the value of your project outcomes. It's easy to get caught up in the costs of a project, but it's important to remember the ultimate goal and the value it will bring to your organization. Make sure to regularly assess the return on investment of your project to ensure it's worth the investment.

A word here. I've been forced to captain a sinking ship before. In my many years working in the corporate world, I've informed project sponsors that their project is over budget or the expense exceeds any benefits the project might bring, but was told to continue. Sometimes money is no option and the sponsor just wants what they want.

Keep the sponsor informed but keep in mind what they want ultimately. This may require a little mind reading sometimes. Sometimes the money doesn't matter, or the time doesn't matter. Sometimes they may be willing to even sacrifice quality to save time or money. You know your organization and the politics and so forth that might be at play, so keep the communication open and proceed as required.

By following these tips and techniques, you can effectively estimate and manage your project budget, ensuring every penny is put to good use.

Remember, budgeting may not be the most glamorous aspect of project management, but it's essential for the success of your project.



CHAPTER 6

RESOURCE MANAGEMENT: HOW TO AVOID BURNOUT AND KEEP YOUR TEAM SANE

As an incidental project manager, you may be responsible for managing a team of individuals with different personalities, work styles, and skill sets. One of the most important aspects of managing a team is resource management, which involves ensuring your team members have the resources they need to succeed while avoiding burnout.

The first step in effective resource management is to identify the resources your team needs to complete the project. This includes everything from personnel to equipment, software, and materials. Make sure your team has the necessary resources to complete their tasks efficiently and effectively.

Next, it's important to manage workloads and avoid burnout. This means ensuring team members aren't overloaded with work and have a reasonable workload.

Encourage team members to take breaks and prioritize self-care to avoid burnout.

Effective communication is also essential in resource management. Make sure your team members know what's expected of them and have clear goals and deadlines. Encourage open communication and feedback to ensure everyone is on the same page.

Another important aspect of resource management is talent development. This means identifying the strengths and weaknesses of your team members and providing opportunities for growth and development. Consider providing training or mentorship to help team members improve their skills and grow in their roles.

Finally, it's important to recognize and reward team members for their hard work and contributions.

CHAPTER 6

This can be as simple as a verbal acknowledgement or a small gesture of appreciation. Recognizing and rewarding team members can boost morale and encourage continued success.

Often times, you don't get to select your team and the team members not only report to other line managers in the organization but they have their everyday jobs to do in addition to the tasks they are assigned on your project. Keep this in mind as you manage resources and schedule. Make sure you understand what percentage of time each person can and will dedicate to your project.

Also, you can still help with development and give meaningful recognition. You will just have to be creative. Be a little birdie and mention to their direct manager how well they are performing on the team or suggest other opportunities that may benefit the person's development and personal goals. Being an advocate for your project team members can go a long way in securing cooperation on the project as well as future relationships.

By effectively managing your team's resources, you can avoid burnout and ensure your team members have the support they need to succeed.

Remember, your team members are your most valuable resource, so it's important to foster a healthy team environment and find ways to invest in their growth.



CHAPTER 7

EFFECTIVE COMMUNICATION – HOW TO KEEP EVERYONE ON THE SAME PAGE

Communication is key in any relationship, and managing a project is no exception. As an incidental project manager, you'll find yourself playing the role of a translator, mediator, and diplomat, all at the same time. You'll have to communicate effectively with your team, stakeholders, and clients to ensure that everyone is on the same page.

Now, here's the thing about communication - it's not just about talking. It's about listening, too. And as a project manager, you'll need to listen to your team and understand their concerns and suggestions. After all, they're the ones doing the work, so they'll know what's feasible and what's not.

But let's face it, sometimes communicating with your team can be like trying to herd cats (remember that analogy?). They all have their own ideas, priorities, and ways of working. So, how do you keep everyone on the same page?

First and foremost, make sure you set clear expectations and goals from the beginning. Use plain language, and avoid jargon and technical terms that might confuse people. And if you're not sure if your message is getting across, ask your team to repeat it back to you in their own words.

Another important aspect of communication is keeping everyone updated on project progress. Schedule regular team meetings and provide status reports to keep everyone in the loop. And don't forget to listen to your team's feedback - it might help you identify issues before they become major problems.

Now, let's talk about communicating with stakeholders and clients. This can be a whole different ball game, as they might not have the same technical knowledge as your team. So, it's important to communicate in a way that they'll understand.

CHAPTER 6

Use visual aids, like diagrams and charts, to help explain complex concepts. Don't be afraid to ask, "What is your preferred way of communicating?" or "How would you like me to communicate project status to you?" You may find that some stakeholders only want the highest level of information and are not interested in the details or minutiae. Save them the headache and save yourself some time and only give them what they want.

But what if you have a difficult stakeholder or client? Don't worry, you're not alone. Managing stakeholder expectations can be a challenge, but there are strategies you can use to keep things on track.

Be proactive in communicating with them, and make sure you understand their priorities and concerns. And remember, sometimes you might have to say "no" to a request if it's not feasible or within scope.

Effective communication is crucial to the success of any project. As an incidental project manager, you'll need to hone your communication skills to keep everyone on the same page.

So, remember to listen to your team, set clear expectations, and communicate in a way that everyone can understand. And if all else fails, just put on some cat ears, slink around the office, and meow like a cat. They will figure it out! (Just kidding, please don't actually do that.)



CHAPTER 8

"RISK MANAGEMENT: EXPECT THE UNEXPECTED (BECAUSE IT WILL HAPPEN)"

Well, well, well. You thought you had it all figured out, huh? You put your heart and soul into planning this project, but let's face it - life happens. And with life comes risks and unexpected events that can throw your plans off track. But fear not, my incidental friend, for risk management is here to save the day!

Now, you might think you need to be a crystal ball-gazing, fortune-telling, psychic wizard to manage risks. But really, all you need is a good sense of humor and a solid plan.

So, let's start by identifying potential risks. Think about all the things that could go wrong - from losing a team member to a global pandemic (yikes!). Next, rate the likelihood of each risk occurring. Is it a remote possibility, or is it more likely to happen than your boss saying "no" to a free donut?

Once you've identified your risks, it's time to get creative and brainstorm some strategies to manage or mitigate them.

You could develop a contingency plan, assign backup team members, or even perform a rain dance if you're feeling particularly adventurous (hey, you never know, it might work!). Don't try to do this in a vacuum. Involve your team members.

Finally, always have a worst-case scenario plan in place. What if all your team members suddenly come down with the flu? What if a spy balloon falls on your office building? Okay, that last one might be a bit extreme, but you get the point.

Risk management is not about predicting the future, but about being ready for whatever the future throws your way. Responding to change and risks separates the men from the boys! Or, to put it in a less sexist way, the good from the inexperienced. And with a solid plan, you can handle anything that comes your way

CHAPTER 9

"MANAGING EXPECTATIONS: BECAUSE YOU CAN'T PLEASE EVERYONE" STAKEHOLDER

Ah, stakeholders. The folks who hold the power to make or break your project. It's like playing a game of Jenga with them - one wrong move and everything comes tumbling down. But fear not, my friend, for managing stakeholder expectations is a delicate dance that can be mastered with the right mindset and a whole lot of patience.

First things first, let's define the term 'stakeholder'. These are the individuals or groups who have an interest in your project and can affect, or be affected by, its outcome. Think clients, team members, investors, the neighborhood cat, you name it.

Now, as we all know, you can't please everyone. It's like trying to find a parking spot at Disneyland on a Saturday - good luck with that. So instead of bending over backwards to make everyone happy, focus on setting realistic expectations and communicating clearly with your stakeholders.

Make sure everyone knows what the project entails, what the goals are, and what each stakeholder's role is. Be transparent about any constraints or limitations that may impact the project's success. And when conflicts inevitably arise, approach them with an open mind and a willingness to compromise. Remember, you're all on the same team, working towards a common goal - world domination, or whatever your project's goal may be.

But let's be real here, sometimes the most important stakeholder to please is yourself. I mean, come on, who doesn't love a little bit of self-gratification? So don't forget to take care of yourself and your team as well. Because at the end of the day, a happy and fulfilled team means a successful project.

So embrace the art of managing stakeholder expectations, and remember, if all else fails, just bring some cookies to the next stakeholder meeting. It's hard to be mad when there are cookies involved.

CHAPTER 10

"CHANGE MANAGEMENT: WHEN THINGS GO OFF THE RAILS (AND THEY WILL)"

Change is inevitable, especially in the world of project management. No matter how well you plan, there will always be unexpected hiccups that require adjustments to the project's scope, schedule, or budget. This is where a crystal ball would be amazing but alas, we have change management.

Change management is the process of identifying, documenting, approving, and implementing changes to the project. It's all about keeping things on track while still being flexible enough to adapt to new information or circumstances.

But let's face it, change can be scary. No one likes to deviate from the plan, especially when the stakes are high. So how do you manage change without losing your cool (or your job)?

First, stay calm. Take a deep breath and remember that change is a natural part of any project. It's really an opportunity.

It's an opportunity to learn and make things better. Change isn't always bad.

Next, assess the situation. What has changed, and how does it impact the project? Is the change necessary, or can it be avoided? What are the potential risks and rewards of the change?

Once you have a clear understanding of the situation, communicate it to your team and stakeholders. Be transparent about the change and its impact on the project. Listen to their concerns and feedback, and work together to find a solution that meets everyone's needs.

Update your project plan and documentation to reflect the change. As mentioned in chapter 4, have a process for handling changes. Make sure everyone is on the same page and knows what the new plan is. And don't forget to track the impact of the change on the project's scope, schedule, and budget.

CHAPTER 10

Finally, evaluate the change. Did it have the desired effect? What can you learn from the experience? Use this knowledge to improve your change management process for future projects.

Remember, change is not the enemy. With the right mindset and approach, you can turn it into an opportunity to create a better project and make you a better project manager.



CHAPTER 11

"QUALITY CONTROL AND ASSURANCE: A QUEST FOR PERFECTION OR THE FINE ART OF NITPICKING?"

When it comes to project management, quality is everything. You want to deliver a product or service that meets or exceeds your stakeholders' expectations. But how do you ensure that quality is built into the project from the start?

That's where quality control and assurance come in. Quality control is the process of monitoring project activities to ensure they meet the requirements and standards set out in the project plan. Quality assurance, on the other hand, is the process of verifying that the project outputs meet the required quality standards.

But let's be real, quality control and assurance can be a bit of a drag. No one likes to review documentation or double-check their work. It can feel like a waste of time, especially when you're up against tight deadlines.

So how do you make quality control and assurance more engaging (dare I say, even fun)?

First, make it a team effort. Involve everyone in the quality process, from the project manager to the team members. Encourage everyone to take ownership of the quality of their work and hold each other accountable.

Second, gamify it. Create challenges and rewards for meeting quality standards. Use leaderboards and badges to recognize team members who go above and beyond. Make it a competition, and watch as your team members become quality control and assurance champions.

Third, make it visual. Use diagrams, flowcharts, and other visual aids to help team members understand the quality standards and how they fit into the project as a whole.

CHAPTER 11

Visual aids can make quality control and assurance more engaging and easier to understand.

Finally, remember that quality control and assurance are not one-time events. They should be built into the project from the beginning and continued throughout the project's life cycle. Make it a habit, and you'll see the benefits in short order.



CHAPTER 12

PROCUREMENT MANAGEMENT: HOW TO GET WHAT YOU NEED (WITHOUT BREAKING THE BANK)

Procurement management is a crucial component of any successful project. Have I said that about everything? Well, it's true. After all, you can't complete a project without the necessary resources, and sometimes that means buying or renting equipment, software, or even hiring outside consultants. In this chapter, we'll cover the ins and outs of procurement management and give you the tools to get what you need without blowing your budget.

First things first: before you start any procurement process, you need to identify what you need. That might sound obvious, but you'd be surprised how many project managers jump straight into procurement without having a clear understanding of their requirements. You don't want to waste time and money on something that won't actually help you achieve your project goals.

Once you know what you need, it's time to start shopping. There are a few different procurement methods you can use, depending on your organization's policies and the nature of your project. Some common methods include:

- **Request for Proposal (RFP):** This is a formal request for vendors to submit a proposal that outlines how they can meet your project requirements. RFPs are typically used for complex, high-value purchases.
- **Request for Quotation (RFQ):** This is a less formal request that asks vendors to provide a price quote for a specific product or service.
- **Invitation to Bid (ITB):** This is a formal invitation to vendors to submit a bid for a specific product or service. The lowest bidder usually wins the contract.

Regardless of the procurement method you choose, it's important to be clear about your requirements and evaluation criteria. You don't want to be swayed by a vendor's flashy marketing materials or promises of quick delivery if they can't actually deliver on your project needs.

Another important consideration is budget. It's easy to get carried away and overspend when you're excited about a new project, but remember: you're accountable for your budget, and overspending could have serious consequences down the line. Make sure you have a clear understanding of how much you can spend before you start any procurement process, and stick to that budget as closely as possible.

Finally, don't forget about contract management. Once you've selected a vendor and signed a contract, it's important to manage that relationship carefully to ensure they're meeting their obligations and delivering the products or services you need. That might mean setting up regular check-ins, monitoring performance metrics, or even terminating the contract if the vendor isn't living up to their end of the bargain.

Procurement management might not be the most interesting part of project management, but it's a critical component.

By taking the time to identify your requirements, choose the right procurement method, and manage your vendors carefully, you can get what you need without breaking the bank.



CHAPTER 13

PROJECT CLOSEOUT – WRAPPING THINGS UP (AND BREATHING A SIGH OF RELIEF)

Ah, the sweet sound of silence. After months or even years of hard work, it's finally time to close out your project. But wait, there are still a few things left to do before you can call it a day. It's tempting to move on and hope you never have to go through that again, but do yourself a favor and do not skip this step.

First things first, you need to make sure that all project deliverables have been completed and signed off by your stakeholders. You don't want any loose ends that could come back to haunt you later. It's like trying to leave a party without saying goodbye to the host – it's just rude and could damage your reputation.

Once you've tied up all the loose ends, it's time for the final review. This is where you gather your team together and go over everything that was done, what worked, what didn't, and what you could have done better.

It's like a post-game analysis for a sports team, except you don't get to celebrate with a shower of Gatorade or champagne. Of course, the last step is to close out all contracts and finalize all financials. This is where you get to see the fruits of your labor and find out if you came in under budget (fingers crossed!) or if you'll be paying off this project for years to come.

But the best part of project closeout? Celebrating with your team! It's time to order pizza and pat yourselves on the back for a job well done. You did it, you crazy cats! You herded those project scope cats, you avoided burnout and kept your team sane, you communicated effectively, managed risks, pleased stakeholders, controlled quality, and closed out the project with grace.

Now go take a well-deserved break. After all, you performed so well, you are sure to get tapped again for the next project. Maybe you should consider doing this full time? Hmmm?

CHAPTER 14

"LESSONS LEARNED: HOW TO IMPROVE YOUR PROJECT MANAGEMENT SKILLS (AND AVOID MAKING THE SAME MISTAKES TWICE)"

So, you've completed your project, and you're breathing a sigh of relief. But before you move on to the next one, take a moment to reflect on what went well and what didn't. This is where lessons learned come into play.

Think of lessons learned as a debriefing session with yourself and your team. It's a chance to analyze what happened during the project, what worked, what didn't work, and what could have been done differently.

But let's face it, no one likes to admit their mistakes. It can be tempting to sweep things under the rug and move on, but trust me, that's not the way to go. The only way to improve your project management skills is to acknowledge your mistakes and learn from them.

So, how do you conduct a successful lessons learned session?

Here are a few tips:

1. **Be honest with yourself:** This is not the time to sugarcoat things. Be honest about what went wrong and what you could have done better.
2. **Involve your team:** Your team members were there with you every step of the way. They may have insights and perspectives that you didn't consider. Plus, it's always good to get a second opinion.
3. **Focus on solutions:** It's easy to dwell on the negative aspects of the project, but the goal of lessons learned is to identify solutions and ways to improve. So, keep the focus on the future, not the past.
4. **Take action:** Once you've identified areas for improvement, don't just let them sit there. Take action and implement changes in your next project.

5. Celebrate successes: It's important to acknowledge the things that went well during the project. Celebrate your successes and use them as motivation for future projects.

Yet another bonus tip, incorporate lessons learned throughout the life of your project. If you can find out about something in time to make a change for the better why wait until the end of the project? Depending on how long your project is, consider reviewing lessons learned weekly, monthly or quarterly. Whatever makes sense to or schedule.

Remember, the goal of lessons learned is not to assign blame or beat yourself up over mistakes. It's about learning from those mistakes and becoming a better project manager and a better team. So, embrace the process, learn from your mistakes, and keep improving!



CHAPTER 15

THE INCIDENTAL PROJECT MANAGER'S SURVIVAL GUIDE: TIPS, TRICKS, AND STRATEGIES FOR SUCCESS

Look at You! You've made it through the turmoil of your first project and have hopefully come out relatively unscathed. But don't let your guard down just yet – there could be another project looming on the horizon.

To help you prepare for your next foray into project management, here are some tips, tricks, and strategies to keep in mind:

- **Embrace the chaos:** Let's face it, project management can be a bit of a wild ride. But instead of fighting against it, try to embrace the chaos. Look for the opportunities in the unexpected and use your creativity to find solutions to problems.
- **Communicate, communicate, communicate:** Effective communication is key to successful project management.

Make sure you keep everyone on the same page, from stakeholders to team members, and don't be afraid to ask for help or clarification when you need it.

- **Keep learning:** The world of project management is constantly evolving, so make sure you stay up to date on the latest trends and best practices. Attend conferences, read books and articles, and connect with other project managers to continue improving your skills.
- **Learn from your mistakes:** As much as we all try to avoid them, mistakes happen. But instead of dwelling on them, use them as opportunities to learn and grow. Analyze what went wrong and come up with strategies to prevent similar issues in the future.
- **Celebrate your successes:** Don't forget to take a moment to celebrate when you've successfully completed a project.

CHAPTER 15

Recognize the hard work of your team members and take time to reflect on what went well and what you could do even better next time.

Even the most experienced project managers encounter challenges and setbacks. But by following these tips and staying focused on your goals, you can successfully navigate the oft-tumultuous waters of project management and emerge victorious. I've also included some resources you might be interested in in the Appendix just in case you want to continue in the project management profession.



CONCLUSION

NOW WASN'T THAT FUN?

Congratulations, you've made it to the end! You've learned about everything from herding cats to avoiding burnout, to making every penny count. You are now equipped to tackle any project with confidence and maybe even a little bit of humor.

Throughout this guide, I've stressed the importance of planning and communication, but I've also acknowledged that things don't always go according to plan. And that's okay! In fact, that's part of the fun of project management. It's a constant exercise in problem-solving and thinking on your feet.

One thing that I hope you've taken away from this book is the importance of learning from your mistakes. Use those experiences to learn and improve your skills for the next project or just life in general. After all, to err is human. It's how we learn and grow that counts. By following the principles outlined in this book, you'll be able to also build a strong and cohesive team, one that's capable of achieving great things.

So, as you embark on your next project, if you dare, remember to take a deep breath and don't panic. Yes, things will go wrong. Yes, you'll face unexpected challenges. But with the right mindset, the right tools, and me as your lifeline, you've got this project management thing in the bag!

Good luck on your next project!

APPENDIX

ADDITIONAL RESOURCES

Here are some additional resources that may be helpful for incidental project managers who desire to dig deeper into the project management profession:

- **Project Management Institute (PMI)** - PMI is a professional association for project managers and offers certifications, training, and resources for project managers of all levels. Check to see if you have a local chapter for networking opportunities.
- **ProjectManager.com** - This online project management software offers tools and resources for project managers to plan, monitor, and control projects.
- **"Crucial Conversations: Tools for Talking When Stakes Are High"** by Kerry Patterson, Joseph Grenny, Ron McMillan, and Al Switzler - This book provides guidance on how to have difficult conversations in the workplace, which can be useful for incidental project managers who need to manage stakeholders and team members.
- **Grow with Google** - Google provides online training for in-demand careers and they offer a certificate for project management.
- **LinkedIn Learning** - This online learning platform offers a wide range of project management courses and resources for project managers at all levels.
- **teresadurham.com** - This is my company site providing a blog, Project Management coaching as well as consulting to help you reach your goals through project management, process improvement and business operations management. You might want to check out the unique PM merch as well.

By utilizing these resources and continuing to develop your skills and knowledge, you can continue to grow and succeed as a project manager (incidental or deliberate).