

# INTRODUCTION

**W**e all have had moments where we have to start a project and ensure that we properly complete it. Whether if it's for a school project or merely starting your own home garden. Both of these examples have one thing in common: Planning!

Having a plan in place to follow or risk failing to finish. Surprised? I know most people would say that “of course planning is necessary,” but you would be surprised on how many groups do not finish a project because they simply do not have a plan to follow.

Throughout this document, we will guide you through a project and discuss the importance of keeping records, real-world strategies for managing client expectations while handling project changes and provide advice on how to keep a professional relationship between you and your client.

Finally, and the most critical part, we will review and address the problems

you might encounter throughout the project, also known as “red flags” issues.

For your convenience, we have separated each step as chapters and is conveniently placed below. Simply click the following titles below or open the bookmark menu located at the top of this screen, and pick a chapter to move on to that specific section.



# GETTING STARTED



**A**s a project manager, your first step must always be creating a well-designed and thorough system since this will help execute the whole project from start to finish with ease. This system must include the clients needs, budget, risk, time, cost, and lastly, the result.

In other words, a well-developed plan will not only help you, and your company, gain profit from a job, but it will also build a lasting relationship with your client since you and your team delivered the project on time while staying within the budget.

Do not forget about the clients' needs as this is the most critical part of the plan. Meet with the client, ask them questions and gather as much information as you can about the project and what they want to accomplish. With this data, you can then determine the budget, price, how many people you may need, and time of completion.

The next step is finding an office and the right people to employ so the project is adequately and skillfully done. If working with a smaller project that can be appropriately executed by only a handful of designers, then find a smaller office for them to work in. However, a bigger office means you can hire more talents and work on multiple or more extensive projects.

Once your designers are in place, it's time to execute your plan. Breaking down the project into parts might be essential and beneficial. Furthermore, make sure that you are specific and accurate about the project so that your employees understand what they need to do and avoid any confusions in the future.

Remember, a successful project is only as good as its leader and its team, and by making sure that you are clear and straight at the beginning and do not leave anything out of the plan, the project can be completed with little-to-no problem.

# IMPORTANCE OF KEEPING RECORDS

Once the project has begun, your next step is to keep records of all documents and files throughout the project. These documents include, but not limited to, design elements, schedules, expenses, logistics, etc. You can use examples to list on your checklist of things to ensure that your project is on track:

## **PRELIMINARY AND DAY-TO-DAY RECORDS:**

This should include each person's contact info, such as the name, department, job title, phone number, email etc. Make sure that everyone has a directory of this information.

- Your internal planning worksheet and draft schedule.
- A copy of the formal proposal document that the client signed.
- A contact sheet for all members of the design and client team.
- Teams progress day by day.
- Time sheet to keep track of time spent on project.
- Supply list of things or supplies used on the project.
- Always update the invoices as well.

Take the initiative and keep a list of Progress Reports. These reports should be given directly to the project managers for each task to keep them informed throughout the development.

These reports will help you, the project manager, determine to know where your team is at, and if they are on track, or taking too long on a section of the work. Furthermore, these reports will also help you address and take control of the problem early rather than later in the project where it might be too late to fix the issue.

Develop a habit to check-in with your teams progress to ensure that the project is being completed on time, as well as making sure that everything is done correctly.

You, as the project manager, do not want to miss anything because this can cause a delay due to revisions, backtracking, or worse, starting the whole project over.





# MANAGING CHANGES

**E**xpect to make changes throughout the developmental process since no project is perfect in the end. As stated at the beginning, your end-goal is the clients satisfaction, so plan for these revisions!

If changes in the project are necessary, then stay on track, embrace them, and plan to interact with each revision with your team. However, it is imperative that you make sure that these revisions don't interfere with your budget, these changes might cause the project to cost more money than expected or take longer than anticipated.

Furthermore, have your team inform you about every revision made in the project make sure you keep a record. The team should fill out a change order request form that includes the following: The date, and the name of the client who made the request, a detailed description of why changes are being made, the names of the people who were notified by these changes, and finally, the effects that these revisions will have on the project. Ensure that these forms are signed by the project manager and the designer.

Inform the client that additional paperwork must be completed first before any changes are made in the project, and these order forms must be approved within a certain number of days. These statements and change forms must also be included in the original contract.

Everyone has had a moment where they want to complete a project adequately. However, most people fail to accomplish this because they lack the organization, or missed some minor detail necessary during the planning process. Make sure that you, the project manager, do not fall for these "red flags."

Communicate with your team, keep them motivated and focused, assure that the project is on time. Remember to be clear when explaining the plan in front of your team since unclear objectives can be costly!

Lastly, and most importantly, communicate with your client and provide them the best service you can offer. Your business depends on them, and it is your job to ensure that they are satisfied.



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