

Ask SCORE

6 SIMPLE STEPS FOR GETTING THINGS DONE AT YOUR SMALL BUSINESS

Whether you are running a for-profit or nonprofit business, an ability to organize efforts and initiatives is a necessary skill to achieve success. Effectively executing efforts and accomplishing goals requires planning and coordination among team members (which may be a combination of employees, vendors, suppliers, contractors, etc.).

While some small business owners seem to have a natural knack for project management, it is not everyone's strength. Do not feel defeated if it is not yours and you do not have the resources to hire a professional project manager.

With a process in place to guide you, you — or a designated person from your team — will become more adept at moving projects from start to finish.

The following tips will help you create a roadmap that you can follow whenever embarking on any new project.



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Your 6-Step Guide to Successful Project Management

1. Define your goal and get buy-in from all project team members.

As you do this, you will want to determine each team member's role and responsibilities. In this step, also consider how the project will affect your company and how you will measure the project's impact.

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2. Determine the project deliverables.

What key tasks do team members need to accomplish to move the project along the path to completion? You will also need to identify which deliverables depend on other deliverables, so you can establish a timeline that puts tasks in a logical order.

3. List the resources you will need.

Assess what you will need regarding budget, person-hours and tools to complete the project.

4. Set a timeline and identify milestones to mark your progress.

After knowing what needs to be done and by whom, create target completion dates for your project deliverables. In your timeline, identify interim goals ("milestones") that can serve as major landmarks along the way. As the project progresses, your ability to reach milestones will help you know if you'll need to adjust your scope, budget or expectations. Milestones also help boost morale as they help project team members see the progress they have made.

5. Define the collaborative process.

Determine how often your team members will meet as a group to report

their progress and share any challenges that might prevent them from fulfilling their deadlines. Schedule your meetings well in advance, so everyone on your team can reserve the dates and times on their calendars.

6. Select a tool to help you stay organized and keep all project documentation in a single place accessible to all team members.

A variety of online tools exist that can help you manage projects. Some are more intuitive than others, so assess your team members' comfort level with the technology involved before choosing what you will use. A few examples that might be a good fit for your business include Trello, Evernote, Asana, Dropbox, and Google Drive.

Although you might try to save time by skipping some of the initial steps in the process, you should resist that temptation. Successful project management begins with thorough planning. Shortcuts in the beginning could lead to misunderstandings among team members—and missed deadlines.

