

# What is Project Management?

Project Management (or PM) is often associated with Software Project Management, at least here in SF. While that's not necessarily untrue, the practice of managing projects is really a very general activity and is used all over, from building houses to setting up a music festival.

In a nutshell, managing projects is making sure that the **right things** get done by the **right people** in the **right way**, and at the **right time**, usually with the use of any of the known PM methodologies.

PM methodologies range from very formal, structured, to very loose and unstructured.

An example of the former is Waterfall, which lends itself to projects that need to have everything laid out and planned beforehand.

An example of the latter would be any Agile methodology, which lends itself to fluid requirements and timelines.



# PM Best Practices

PM Methodologies vary and so do the aspects of project management that each methodology emphasizes.

However, some aspects of Project Management are still generally considered to be valuable, regardless of which methodology you use.

## Best Practices, regardless of methodology:

- **Plan and schedule well.** Allow for some uncertainty in scheduling and build buffers in your time frames.
- **Documentation is important.** While Agile methodologies place less emphasis on this, they also don't simply disregard documentation.
- **Communicate.** When in doubt, over-communicate. It's a PM's job to let everyone know where they are and where the project is headed.

## The Agile Manifesto, 2001

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- **Individuals and interactions** over processes and tools
- **Working software** over comprehensive documentation
- **Customer collaboration** over contract negotiation
- **Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

# What is Scrum?

Scrum is an Agile framework. That is, Scrum is a set of methods, techniques, ways, styles to go about managing projects in an Agile way.

Scrum takes its name from a rugby scrum where team members put their heads down and gather where the ball is – somewhat like the way that Scrum emphasizes teamwork.

## Scrum is usually defined by these practices:

- **Sprints.** These are short durations (often 2 weeks) around which team activities are both planned and executed.
- **Scrums (Or Scrum Meetings).** These are daily meetings with guidelines that are meant to discourage wasted time. Hence, these meetings are usually stand-up meetings, and why more detailed discussions are discussed at another time and that non-project members are welcome but cannot contribute to the discussion.



## Make Trello a Habit

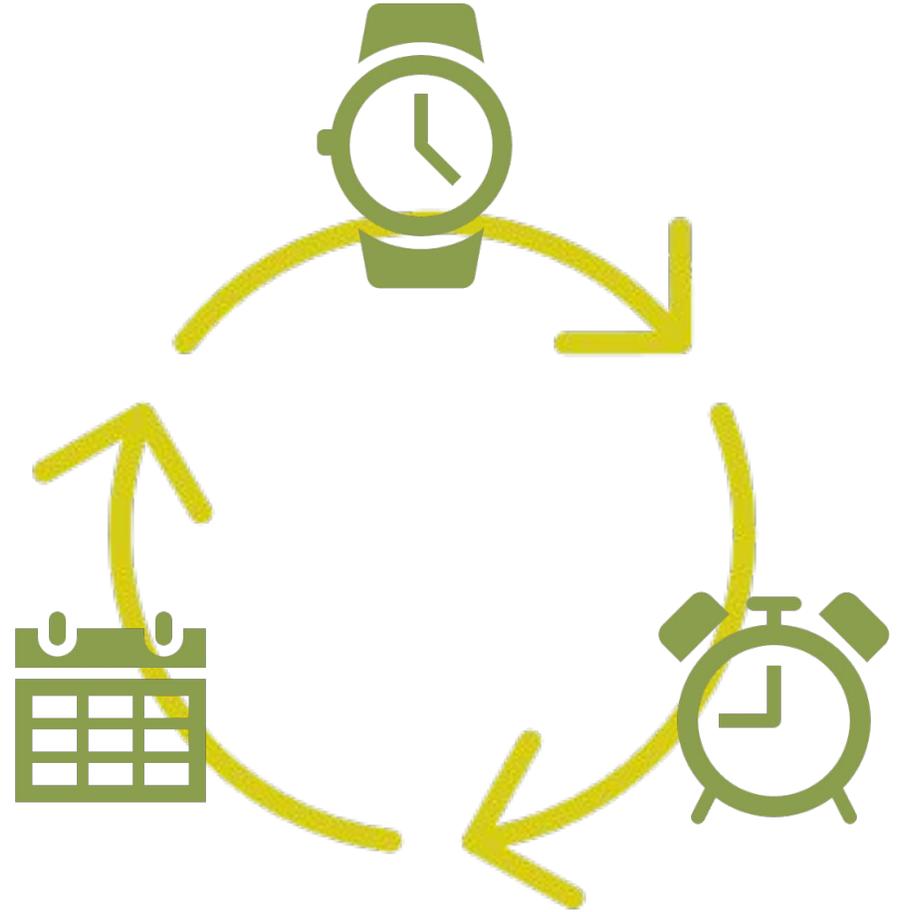
When you're working with Trello or any other PM tool or system, you have to consciously make it a habit to use.

Check and update it with as much enthusiasm (or lacking that, with as much regularity) as checking Social Media.



### Protip:

If you (like many people) check Facebook or Slack or IM's first thing in the morning, make checking Trello the second thing you do. Your projects will thank you.



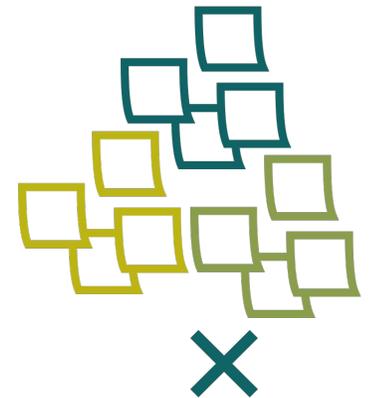
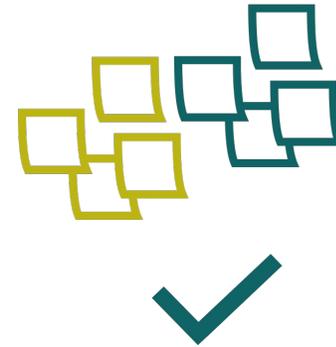
# Keep it Organized, but Stay Simple

The most common way to use Trello is to separate tasks into **Cards**, and group Tasks into **Lists**, such as Not Yet Started, Ongoing, or Completed.

Best practice is to straddle the middle ground where Lists are specific enough that they're easily identifiable from each other, and yet general enough that when a new task is created, you don't have to think hard about where to put the card.

**Protip:** When you make a new card/task and you have trouble trying to figure out which List to put it in, you might have a problem with your lists either being too specific or too general.

**Protip:** When you need another dimension to categorize your cards (such as status, whether on-time, or delayed), you can use color labels.



## Balance the Level of Detail

Just like the previous slide where you should look for a good balance between simplicity and complexity, you should also strive for the same balance with the level of details for the **Cards** that you make.

**Protip:** When you and your team are making a lot of progress and really getting things done but somehow your Trello plan doesn't seem to match the progress, you might want to consider decomposing your monolithic **Cards** into more manageable pieces.



**Protip:** On the other hand, if you find that small task completions and minimal progress requires so much work to update Trello, it could be that your **Cards** are too low-level and are tracking relatively insignificant progress. You might then want to consider stepping back and condensing multiple or more complex tasks into fewer cards.



# Communicate, Communicate, Communicate

It's been said that the job of managing projects boils down to primarily 2 things: **Planning** and **Communication**.

Traditional PM tools like MS Project excel at planning and scheduling. Newer platforms like Trello excel at communicating. Take advantage of Trello Notifications to automatically communicate updates, reminders and changes.

**Protip:** Use built-in **Trello Notifications** to their fullest extent. With **Trello**, when you **Watch Cards**, you'll get notifications for:

- All comments from other users
- Adding, changing, and upcoming due dates
- Card moves and archives
- Attachments uploaded to a card

You can also watch **Lists**, or **Boards**, or get default notifications such as when you're **Trello** username is mentioned or when you're added to a **Card, Board** or **Team**.



# DRY – Don't Repeat Yourself

Creating and using **Card Templates** for frequent tasks will help you save time and streamline the effort of managing repeated/similar tasks.

Having such a uniform interface for similar **Cards** also helps everyone quickly make sense of new **Cards** when they're created.

**Protip:** Beyond **Card Templates**, Trello also has real **automation** in the form of **Butler**.



You can use Butler to automatically do rote, housekeeping tasks such as automatically archiving a **Card** that's been Done (a very common use case).

Other uses for Butler include organizing your **Cards**, **Lists**, and **Boards**. A popular one is to create **Board Buttons** that trigger **Butler** to sort cards by due date. Another popular use is to have **Butler** trigger actions (such as adding user to a **Card** when the **Card** is added to a particular **List**.)



## Centralize Information

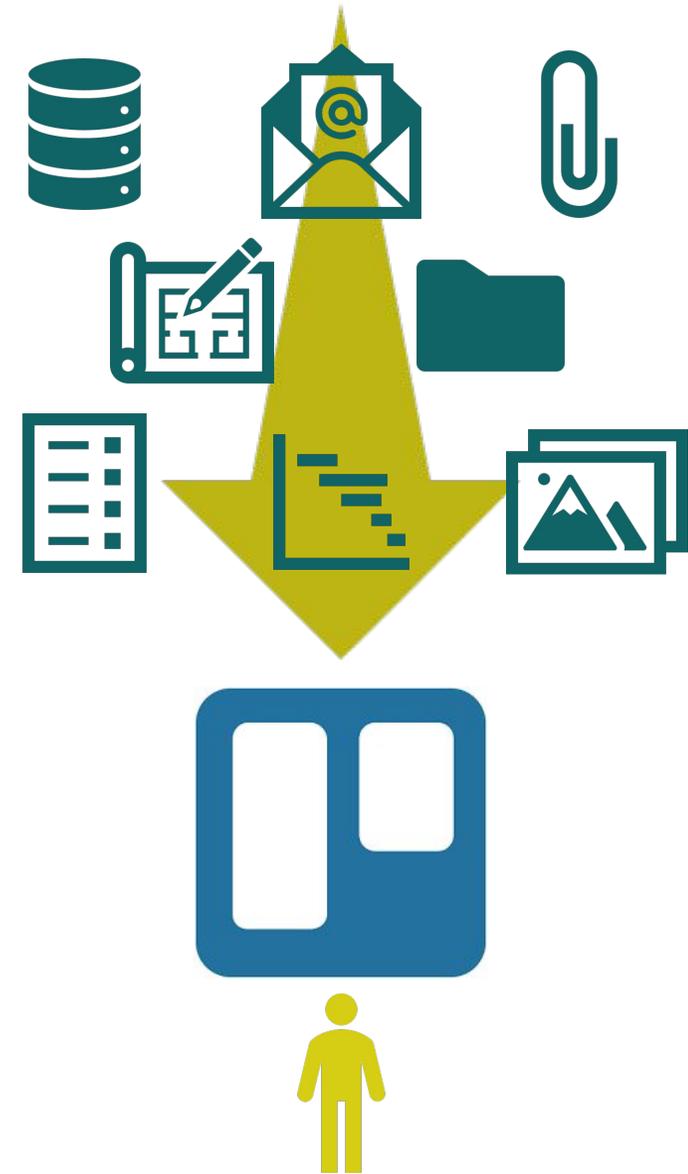
One common misstep is to just use Trello as a message board, having **Cards** that refer to emails, or to folders, or to project assets that reside in a separate location. This forces users to immediately leave the platform just so they can access a piece of info (such as instructions in an email).

Best practice calls for consolidation of information in one place, as much as possible.

**Protip:** You can actually have Trello turn **Emails** into **Cards**. Each board has its own unique email address. Sending email to this address automatically converts it into a **Trello Card**, complete with attachments.



Your users will no longer need to take the extra steps to open their email, and then search for the relevant email when they can just stay in Trello and have the exact same information, without the extra steps.





## Funny Project Management Quotes

“Any project can be estimated accurately! (once it's completed).”

“Nothing is impossible for the person who doesn't have to do it.”

“The person who says it will take the longest and cost the most is the only one with a clue on how to do the project.”

“There are no good project managers - only lucky ones. The more you plan the luckier you get.”

“All project managers face problems on Monday mornings - good project managers are working on next Monday's problems.”

“If it happens once it's ignorance, if it happens twice it's neglect, if it happens three times it's policy.”

“The first 90% of a project takes 90% of the time, the last 10% takes the other 90%.”