



THE PROJECT MANAGEMENT GUIDE: METHODOLOGIES & TOOLS



Editorial

Project-based organisation is a strong trend in companies. It is a bold and structuring choice because it is a less hierarchical and more transversal organisation, where a team with the skills and resources necessary to achieve a common objective is brought together.

More than other changes, moving to project mode involves an important human dimension because it is an organisation that offers more autonomy and therefore more responsibility to employees. Communication within the project team and the sharing of information must therefore be at the heart of managers' priorities.

The objective of this ebook is to shed light on the fundamentals of project management on the one hand, but also to share our expertise, the added value to be expected from a project management solution, so that the digitalisation of your organisation is also a source of performance.

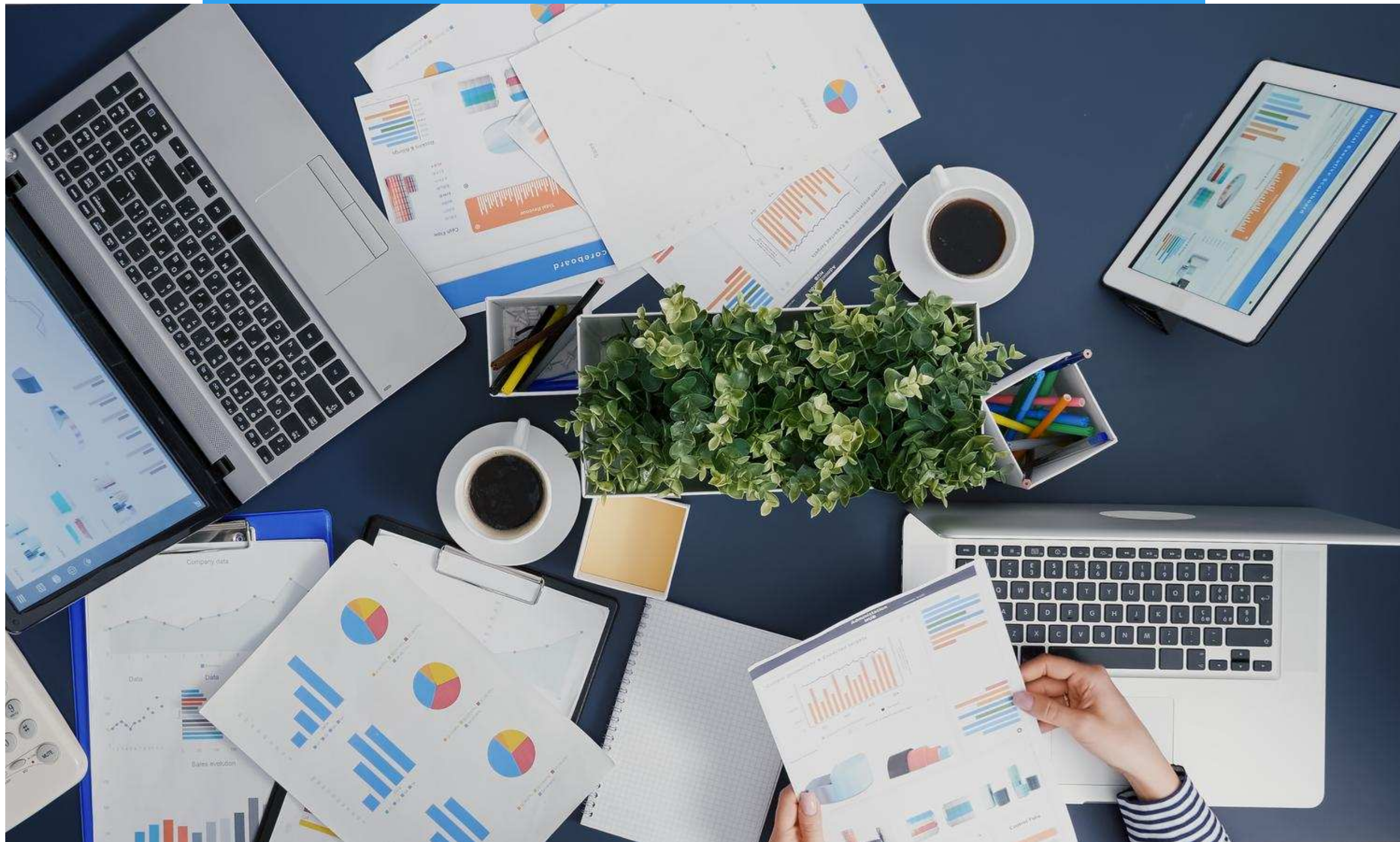


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More than a managerial trend, project mode is a major change in the organisation of a company and its management, which implies more cross-functionality and more responsibility.

It is a state of mind, but above all a methodology that will require communication, training and involvement of managers to mobilise teams.

Lionel Pasco - CEO of Perfony



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Project management: definition and issues



To manage a project, you will have to deal mainly with two issues: time and resources (material and human). The project life cycle will have 6 major phases: design, planning, launch, implementation, governance and closure. Understanding and stabilising the interactions between the different actors, as well as controlling costs, will be the major challenges of this exercise. Project management requires involving the sometimes resistant teams, convincing the financial section, while keeping the final objective in sight.

What is a project ?

A project is usually defined as a set of actions with a start and end date. These actions must be carried out one after the other in a homogeneous way, in order to achieve a defined objective, taking into account the requirements, as well as the time and cost constraints. In particular, it implies the idea of novelty or change.

The project has a limited duration and stops when the objective is reached. The resources it will mobilise are quantifiable. Whether it is a question of human resources (skills), materials or information, resource management will be essential to assess the feasibility of the project.

Project management: definition and issues



Definition of project management

Project management consists of developing all the stages in the life cycle of a project, from the birth of its idea to final delivery. Coordinating the stakeholders involves managing human and material resources (budget and means). Depending on the size of these resources and the scope of the project, you will need to use software to help you implement efficient project management.

The main project management methodologies to know

Few companies have only one project to implement in order to ensure the evolution of their activities, and project mode is now present in all departments and concerns all types of company. You can achieve economic and financial success and optimise control of your operating costs if you adopt project management adapted to your company's needs and in accordance with the budgets you have set upstream.

By applying the appropriate methodology to the plurality and requirements of your various projects to be managed simultaneously, but also by seeking the involvement of all stakeholders in your business, you will develop the best strategies for your company.

Agile project management : what is it?

Among the different project management methods, the so-called "agile" method is distinguished by its orientation towards the customer rather than the product.

This is a completely collaborative management approach. It involves not only the players in the project teams, but also the client himself, who intervenes regularly as the project evolves. The client's role is decisive, as he participates in the achievement of the objective intended for him. In this respect, one of the principles of agile project management is to break down the work into actions to be carried out. In the form of milestones, these actions constitute sub-objectives. This process makes the project more flexible, as it is adaptive. It also leads to a better control of costs, by deploying a short-term vision thanks to the sub-objectives.

In 2001, 17 software developers gathered their knowledge of project management and created the Agile Manifesto. This document frames the aspects of the agile methodology, which can be presented as follows:

- putting the customer at the heart of the process ;
- breaking down the work into sub-objectives ;
- work in teams ;
- agreeing to be flexible.

The agile method is generally contrasted with traditional project management, which consists of working in a cascade, according to what is known as the V cycle. In this traditional method, the project is framed upstream, in a more rigid way, which has the advantage of controlling costs precisely and establishing a budget, but sometimes prevents any improvement in the deliverable.

With the agile method, the client indicates what he needs, then the teams move forward in stages, according to the client's validation. This creates a flexibility that allows the project to be adjusted as it goes along, just as the client's requirements may change along the way. Thus, the delivered project will be as close as possible to the client's expectations, even if some of these expectations were not formalised at the time of the project's conception.

This reactivity is an undeniable advantage over the competition. It should also be noted that the agile method is better suited to organisations with a flexible way of working rather than to large structures with a more structured and formal way of working. The agile method works by iterations, loops that come back and forth between the project teams and the client.

The advantages of the agile method



The agile method is appreciated by both the operational teams and the clients themselves. The fact that it focuses on communication has a lot to do with this. The client sees that his opinion is taken into account and that we are trying to satisfy his requirements. They know that they are free to change their mind, the project remains flexible. Communication is transparent, with constructive exchanges between the client and the teams.

This builds an excellent corporate image and trust. It builds customer loyalty, especially if the deliverable has been a success! The teams will feel valued, as they will not be managed in a hierarchical manner, but transversally, through expert recommendations and peer support. They will communicate directly with the client, and be able to express feasibility, ideas and improvements directly. The skills of the employees will be highlighted and recognised, both by the client and by their management.

Finally, there is cost control. The budget is also adjustable. The control is systematic and permanent. Depending on the decisions that are made as you go along, you know what has already been spent and what still needs to be invested.

The disadvantages of the agile method



The disadvantages of the agile method are few. But by adopting the agile method, you will, for example, have to communicate a lot with the client. The collaborative mode requires a good understanding between all the stakeholders, client teams or project teams. The human element remains the central pivot of this method, and it will only be a success if management provides itself with the means for healthy cooperation.

The client's availability and participation are essential. They will need to find the time and attention to think about the next step together. The processes are not as rigidly formalised as the traditional method. There is relatively little documentation, so the people you talk to should remain the same as far as possible.

Finally, the agile method does not offer the same visibility as a so-called traditional method. This lack of visibility can be felt in the costs. The unexpected can always happen. Even if in this case the agile flexibility is an advantage, the additional cost of this unforeseen event can be a problem.

Agile methodologies for project management



As we have seen above, there is no single project management methodology. Even with agile, there are several ways of doing things. These include the Scrum, Kanban and Lean Development methodologies. Although the processes are different, the common point is the division into milestones or iterations.

To help you define and visualise these milestones, you can use a Gantt chart, which is an excellent way to monitor progress, make adjustments if necessary and take appropriate decisions.

This is a schedule that you can keep on computer or on paper, consisting of rows and columns. It is best, of course, to work on a computer, as it is easier to make successive changes. To this end, a management software program can replace this system and improve it. It will offer you efficient resource management.

This type of software is suitable for all projects, regardless of the field of activity, complexity, size or scope. They structure your projects to help you perform well and meet your commitments to your customers.

7 STEPS TO EFFECTIVE PROJECT MANAGEMENT

A project is built step by step following a precise order, with a competent team, defined and controllable costs, relevant allocation of resources, etc. This requires organisation and the use of management tools such as dashboards or a Gantt chart for real-time monitoring of the progress of tasks. This requires organisation and the use of management tools such as dashboards or a Gantt chart to monitor the progress of tasks in real time. Project management therefore requires the following crucial steps to be followed.

1. Defining the project is the starting point. It needs to be anticipated in a clear, precise and realistic way. A vision that meets the real needs of the company (or the client) will generate better support from the actors. Similarly, if the project and its objectives are well understood and accepted by the team, it will be more effective. It is therefore essential to determine :

- the issues,
- the objectives,
- priorities,
- resources,
- deadlines,
- the skills to be used,
- the roles and responsibilities of everyone,
- the budget.

2. Allocating resources is an important task, as it allows you to assess the means needed to accomplish a particular action. What skills do you have available for the project? Do you need to recruit? If recruitment is necessary, establish processes to facilitate the integration of new staff. Human resource management is a key factor in the success or failure of a project.

3. Deploying an action plan is essential to enable you to monitor and see the progress of the tasks step by step. It provides a framework and organises all the actions to be carried out over a set period of time. You can use a management solution to help you, such as a management tool to view your action plan.

4. Budgeting helps to control costs. Often unforeseen circumstances can cause the budget to be exceeded. When drawing up your budget, set thresholds and alerts that will enable you to react effectively.

5. Organising project monitoring meetings is essential! They allow you to take stock of progress and upcoming tasks, share information between team members, review compliance with the timetable and budgets, etc.

6. Don't forget to value the work of your team! In the field of project management, the involvement and motivation of your staff are crucial to their success or failure. You must therefore know how to manage and motivate them well to get the best out of them.

7. Taking stock after the implementation or delivery of the project is an excellent way of learning from what worked, what was difficult to achieve, what could have been managed differently, etc. as in a continuous improvement process. This assessment is crucial for the management of future projects.

Why invest in a project management tool?



In order to successfully complete the various stages of a project, it is now essential to choose a high-performance digital management tool. The use of a project management solution will considerably facilitate the work of those involved, the monitoring of the progress of tasks using, for example, a Gantt chart, the improvement of productivity, etc. The investment costs are usually quickly recouped thanks to the performance of these tools.

What is project management software ?

Project management software is a collaborative tool whose main purpose is the planning and distribution of tasks. They are generally computer programmes that allow projects to be managed, organised and executed in a virtualised and centralised space. It thus facilitates the work of teams by automating tasks, optimising deadlines, simplifying exchanges, etc.

These functions have been designed so that companies can optimise their resource management and create more cohesion between all the teams involved. It allows for the creation of a project calendar, better allocation and optimisation of resource management through dashboards. It allows you to budget and monitor project costs, create and publish reports, monitor the progress of tasks in real time, etc.

The benefits of investing in project management software



Business software can meet the needs of companies in all sectors. Many business projects fail to meet their objectives or are delivered late. Efficient working solutions are therefore essential.

All the information and files relating to the project are centralised in a single virtual space which each member of the project team can access by logging in with his or her login details. It should also be noted that with this type of solution, you will no longer waste time looking for information or documents. The data is automatically indexed and saved.

Project management is greatly facilitated by collaborative software. Employees on the move can continue to work on the project even when they are geographically distant. The whole project team can communicate, work continuously and organise meetings with all the players involved.

Finally, the security of your data will be optimised with this type of tool since backups and security procedures are regularly launched on external servers. Also, access to the software platform is highly secure.

The 5 essential selection criteria for project management software... plus a 6th

Before choosing one solution over another, it is necessary to know what to look for.

1. Role and rights management

In a project, as in any organisation, not all stakeholders need to see the same thing or have access to all information. For example, a stakeholder in the first milestone does not necessarily need to have access to all subsequent milestones.

Even if the project mode is more transversal than hierarchical, it is therefore important to be able to organise the sharing of data in accordance with management rules.

This criterion is the first on the list because it is rather rare and will therefore enable you to quickly rule out a large number of solutions.

2. Effective structuring of sub-objectives

A project is not a simple action plan. Nor is it a catch-all file into which actions are dumped, and then it is up to each person to find out what they have to do.

As we saw earlier, a project can be subdivided into sub-objectives and milestones. So your project management tool must be able to reproduce this organisation. This point is all the more important as it is on this good structuring that the access right rules mentioned in the previous paragraph will generally be based.

3. A centralising tool

As mentioned above, project mode is a more cross-functional way of organising work. You will therefore be calling on skills which may be scattered and which may only come together on the occasion of this project. It is therefore essential to give the project team a common anchor point which will be your project management tool.

It must allow you to share documents, facilitate exchanges between members, follow the schedule and know what tasks need to be done in a common workspace.

Just imagine how inefficient a project would be if everyone continued to store their deliverables in their usual workspace or if there was a proliferation of materials and action plans!

The 5 essential selection criteria for project management software... plus a 6th

4. A visualisation tool

The tool you choose must also give visibility to your project and to all participants. And the bigger your project, the more important this selection criterion will be.

So of course, your solution should give you a planning view of what needs to be done and the steering meetings, but not only that.

The visual expression of your action plans in the form of a Gantt chart, for example, is also very useful because it allows you to identify critical points. But it is also possible to find solutions that will offer you much more advanced reporting solutions, such as budget monitoring, action compliance, etc.

5. Customisation options

The last point to check is the customisation options. Your project is not the same as your colleague's or neighbour's and its particularities must be taken into account, especially in the dashboards and reports.

So look carefully at the solutions you find to see if they offer the possibility of adding custom fields. This is an idea that you may not think of, but it can make all the difference in the life of the project, because each element will be in the right place in your organisation.

6. A solution compatible with your usual organisation

The move to project mode is already a strong change, which may create reluctance among some participants. It is therefore not recommended to add even more change with completely new tools.

So if your organisation works in a Microsoft environment, consider looking at the AppSource for solutions that integrate with Teams and Outlook. Similarly, if your organisation is in a Google Suite environment, make sure your tool is compatible with Gmail, Google Task and Google Calendar.

This will make it much easier to get started and you will show your employees that you care about them by not forcing a completely different tool on them.

WHY USE PERFONY?



- Simply create your action plans
- Visualise the progress of your actions and those of your teams
- Reduce the mental burden of following up decisions
- Measure the impact and results of your action plans
- Manage your action plans directly during your meetings
- Manage the progress of your progress plans easily
- Identify and share improvement plans with your teams
- Go mobile with MS Teams Mobile and M365 integration
- Simplify your project management with a modern tool

[Request a demo](#)

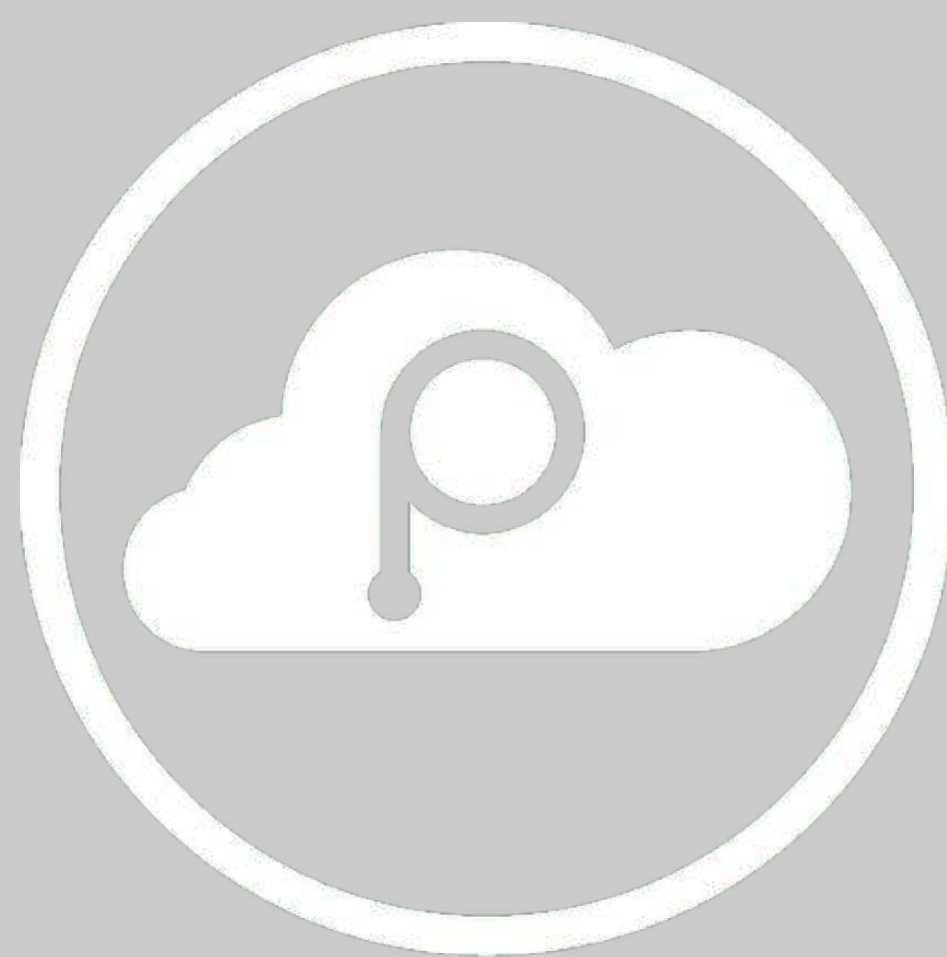
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Perfony is a French publisher, born from the meeting of the management consulting and IT worlds, which has set itself the ambitious project of bringing the principles of operational excellence within everyone's reach.

To this end, it proposes a simple tool that improves the efficiency of teamwork:

- follow-up of action plans,
- traceability of decisions,
- production of meeting minutes,
- compliance with quality requirements...

Perfony is the solution that helps you achieve operational excellence.



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