



## **Chapter Five: “Running” a Project**

Here’s where we are: We’ve done a little introduction to the practical side of project management for SMB. You have the forms to create a binder. With luck, you’ve already printed them out and put them into a binder.

This chapter will address the bigger picture of running your projects. I’ve written a few “forms” books, so I know that people have the tendency to print out the forms and not read the rest. Or, worse, flip through it once and then not look at it again.

But I believe that this simple project management system can improve your business – and your profitability. Here’s an overview of how a project works:

## Start Project

### Start Binder

Define Project (form)

Execute Project

-- Stages, Notes, Timelines, Statuses, etc.

Complete Project Stages

Complete Paperwork / Get Signoff

Complete Evaluation

### Finish up Binder

## Complete Project

Please note: The forms in your project binder are the middle part of this. And Section 5, the “Stages” or action steps, are the core of the core. The forms help you organize that part of the project so that everything gets done and flows as it should.

But the overall project begins before you print the forms, and finishes only after all the forms are filed away in a file cabinet.

So, let’s start all over and look at real-world project management in the SMB space, using the Project Binder described in this document.

## **Real World SMB Project Management**

Real world SMB project management starts with a simple request, or a need identified by the consultant. We’ll use, for our example, the movement of a web site from an in-house server to a hosted server. Here’s the background:

You have a new client. They’ve had a simple five-page web site for many years. And it looks like it. They have hired Cousin Larry’s Pretty Good Web Site Design to build a new site, and to host it. You’ve been asked to help facilitate this move. The client doesn’t want to have a meeting about it. “You and Cousin Larry just take care of it.”

So you find yourself with a pretty clear endpoint, no real direction on how to get there (because that’s your job), and no budget to speak of.

Your tendency might be to call Cousin Larry and get the ball rolling.

No.

You don’t have a service request and you don’t have a project binder.

Nay Sayers Say: “Hey, Karl, you’re insane. This is really simple. We do this all the time. Just do it.”

As you’re driving back to your office, you get a call from the client. “Did you do something while you were here? Our email isn’t working. We can get to the Internet, but we can’t get any email. Our customers say email to us is bouncing.”

Okay. Now you start a service request. You need to be “on the clock” because you have to call Cousin Larry and ask whether he took control of DNS. Yes. Of course. They always do that. And the MX records? Well, they point to the new web server, of course. And there isn’t even a web site there yet! The client doesn’t know that his web site’s down because he doesn’t browse his own web site.

You explain to Cousin Larry that he has messed up the client’s email. And wouldn’t it be better if the WWW host were pointed to the old site until a new site exists? He explains that this has never happened before. You convince him to point the records back to where they were and explain that:

- 1) You will control DNS. Period.
- 2) He will tell you the new address for the web site and you’ll point to it when it’s time.

By the way, how did he change the DNS records? The client gave him his Network Solutions password.

You create a Service Request to gain access to DNS as the technical contact and manage this for the client. This is outside the scope of the project and billed separately. You begin working this SR.

Now, I hope, you see that even simple tasks are projects and need to be treated as such.

So we’re back to square one. Let’s start this project.

### **New Project, Step One – Create SR(s)**

The first thing you need to do is to decide whether this project will use one service request or more than one service request. If you have a simple project, it often makes sense to use a single service request. You will simply list major stages in the SR and keep the details in the project binder.

If you have a really serious project, such as a network migration, then you’ll want several SRs. In this case, I think it does make sense to have a single SR. We’ll call the SR “Move web site to Cousin Larry’s Hosting.”

Click. Enter. SR created. Now you look at your watch and start billing time against it.