Ultimate Guide to Creative Project Management

The All-In-One Solution For Your Creative Team
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Introduction: Why Project Management Is Essential

While there are no two creative projects that are exactly alike, there is a basic framework for successful creative project management. Many seasoned creative project managers can effectively take a project from fruition through completion; however, their experience doesn’t always translate well into advice when you try to learn from them.

After reading this guide, you will be able to start projects on the right foot, use that solid foundation in order to continue your success throughout the project, and end off with an idea of how you can to focus your efforts even more to optimize your project team for the next round.

In addition, you’ll learn how to use creative project management software in order to keep things running smoothly. The platform can be used in many key areas:

- Consolidating communication within your team and stakeholders
- Organizing deliverables and other administrative duties
- Staying on top of budget and reporting
- Providing accurate revenue forecasts to your boss

One of the paramount tenets of creative project management is communication. You’ll notice that throughout this guide, communication is a strongly recurring theme. Have you ever tried working on a project without any communication within your team? Obviously, the answer is no, and if you reflect on how often you needed to have a discussion, send an email, make a presentation, or use other forms of communication, you’ll realize why communication is mentioned so often.

By adhering to project management best practices, you should expect some return on investment. What good is time spent optimizing if there is no increase in efficiency or revenue? In fact, solid project management practices improve communication and allow teams to focus on creative tasks instead of administrative functions. Continue this trend throughout the entire agency for every project and your quarterly earnings figures will be quite attractive.
Understanding the 3 Key Lifecycle Steps of Creative Projects

Creative projects have three distinct stages over their entire life cycle. First is the beginning phase, while the project is still in the planning stage. Then there is the actual meat of the project, where you turn the needs of the client into ideas and actual deliverables. The final phase involves the wrap-up and finishing tasks, which include coordinating debriefs within your team and enacting any reports that can help you move forward more efficiently.

In each of these steps, there are a few key items to keep in mind. Obviously, working with your team efficiently means that all communication should be purposeful. You will see how this can be addressed within each life-cycle step. Also, just because you missed taking care of an issue in one step doesn’t mean that it’s a completely lost cause for the entire duration of the project. Get things back on track and manage the situation whenever the opportunity presents itself.

Step 1: Planning
Plan for projects so that they can be managed more efficiently

Projects go much more smoothly when you have a proper roadmap for them before they begin. It’s easier to avoid problems completely, rather than tackling of them if (and when) they arise. When planning, be sure to follow these key considerations:

Communication Is Key

When you set up your communication guidelines, consider all forms that you’ll be using. Memos, emails, face-to-face meetings, video conferencing, phone calls—the list can be quite extensive. If you have a preference for how you would like to have your team interface with you on certain issues, now is the time to let it be known.

You also need to make sure you have a clear idea of how you will be working with your external stakeholders. From your own CEO to the clients themselves, you want to make sure that you are disseminating the information correctly and concisely. It might be informative to have every detail listed out when you deliver a project brief, but if your audience can’t get through the information, it’s fairly worthless.
Take Care of Administrative Tasks

This doesn’t mean that you need to take care of everything related to administration prior to the project start. What it does mean is that you should make sure you leave your own schedule clear enough to do so as the project evolves.

Your creative team needs to be able to have the freedom to exercise their creativity. If the team members are bogged down by constant reporting and other duties, little time is left to actually perform their own job functions. When the project manager takes on the administrative burden, it frees the creatives to develop the solutions that they’re paid for.

Schedule Meetings and Deadlines with Foresight

Just as you need to leave room in your own schedule for administration, make sure that you allow time for meetings and deadline crunches. If you have a meeting plan set before the project begins, you can adhere to it and maintain productivity. On the other hand, if you go with the “wait and see” plan for meeting timing, it might stretch things past their usefulness.
Step 2: Management
Tips for managing a project that has already begun

If you’re already into a project, that doesn’t mean that you need to drop everything and start from scratch to follow the above guidelines. While you may want to tweak things a bit (you can still set up a recurring meeting on the calendar or enact a communication plan), the most important thing is that you stay on track.

Adjust Schedule When Necessary

Staying on track can be difficult when you need to move the schedule around. When you adjust the plan for the team for a specific deadline, make sure that you give yourself enough padding to complete the rest of the project on schedule. Contact the stakeholders well ahead of the deadlines and ask for extensions, if you know that, after the first time crunch, you won’t be able to meet the next one on time.

Maintain Communication Throughout the Project

When you set up a communication plan, you need to follow through with it. If you have weekly update memos on the plan, make sure that they are sent out in a timely manner. Likewise, if you prefer that all important communication occurs over the phone or face to face, don’t rely on email in order to get the point across. Perhaps use email in order to schedule a meeting, but then follow your plan and relay the actual information you want to send over the phone or in person.

If you find that your group seems to be getting off track, it might be worthwhile to schedule a general meeting to review the communication plan. It doesn’t have to be pedantic; just touch on the high points of the plan and make sure that everyone has a copy of it. If there is behavior that needs to be corrected, use yourself as a negative example and praise the team for when it did follow the plan. This way, you avoid putting the team members on the defensive and instead encourage their positive behavior.
Manage Expectations

When the project scope changes, the stakeholders’ expectations should also change. Alterations to the original project will usually require additional time to complete; the variable is not if there is more time needed, but how much more time. If the changes are small, or if they are communicated early in the project, the expectations (and reality) should be that there is little change to the deadlines. On the other hand, imagine that your team is putting the finishing touches on a deliverable that was in the works for more than a month. The client calls in order to ask for substantial changes in the scope. These changes would have been less intrusive at the beginning of the work, but now will take a considerable amount of time to enact.

The burden falls on the project manager to make sure that the client does not have unreasonable expectations for the turnaround. At times, there is little to no conflict here, in the case of small changes made early in the timeline. Other times, you may need to stand firmly on extending a deadline as a result of eleventh-hour scope changes.
Step 3: Completion
Wrap up plans for finished projects

The project is finished, but your responsibilities are not completed just yet. You have a lot of information to sift through that can help you out for future projects. With the help of your team and the right software tools, you can quickly and easily sort through the data and make decisions on whether or not you need to take the next project in a slightly different direction.

Debriefing Meetings

When you have issues during the project, you shouldn’t wait until the wrap-up to discuss how to address them. However, at times, things can be so hectic that small problems go unnoticed until the calm after the storm. When things slow down, conduct meetings with your project team and determine if there was anything that could be corrected on future projects.

The important part of the meetings isn’t gathering the information, though. It’s following through and actually making corrections for future projects. Nothing kills the flow of constructive criticism faster than ignoring the proposed suggestions. If the suggestions are impractical but have substance, be sure to acknowledge them and ask for additional ideas that could be more functional.

Reporting Functions

When you complete a project, you want to learn as much as you can from the good and the bad portions of it and address the negative aspects so that they can be corrected in the future. While debriefing meetings can help uncover situations that were less than ideal when working within the group itself, there can be areas that go unnoticed by the creative team. Most, if not all, of these areas may not be ones in which the creatives need to be involved. Budgeting and billing come to mind as examples.

Use the increased oversight that comes with being a project manager to investigate the administrative side of the project. Were the anticipated hours for the project close to what was actually worked? And if not, are there areas in which you went over planned hours that can be explained? Otherwise, take a look at how you are planning and scheduling projects. Perhaps you need to adjust your own expectations for project hours for the next contract.
Budgeting is another important area of focus. Reporting revenue and expenses, in addition to comparing anticipated amounts to actual amounts, can help you make calculated decisions for future work. This applies even if you are not responsible for setting contract amounts. This information can help you determine whether or not you need to push back at all on the numbers for the next project, if they come in below what you need to produce the quality of work that is expected of you and your team.

On top of the tips for each lifecycle step, here are a few other great tips that can improve your Creative Project Management skills.

**Identify Areas for Improved Efficiencies**

Even a seasoned project manager can learn from past experiences. When there is an area that could be improved, you don’t want to have the inefficiency swept under the rug by your team. Here are a few thoughts on how you might be able to keep the lines of communication open and work with your team in order to make the group a cohesive, well-oiled machine.

**During the Project**

Have an open-door policy with your team and encourage anyone with ideas to come forward at any point. When the suggestions do present themselves, make sure to be grateful and include them when you make decisions on the immediate issue going forward. In this way, the team member (or members) can feel some ownership over a positive change within the group dynamic.

It might even be prudent to have your open-door policy spelled out with your communication plan. And realize that “open-door” is less literal than encouraging your team to actually come to your desk with suggestions. Just be open and ready for constructive ideas on how to improve the efficiency of the team and project, whether they come in via email, text, phone call, or in person.

**After the Project**

Use the debrief meeting to define what went well and what could be improved. And as stated before, be sure to thank those who contributed ideas and criticism and follow up with them. If you cannot incorporate the recommendation, due to either practicality or a limited timeframe for engagement, still acknowledge the idea and ask if there are any suggestions that would work within the restrictions.

Under no circumstances should you belittle ideas or otherwise discourage your team from suggesting ways to improve efficiencies. Even if it’s outlandish, voicing an idea shows that the team member has the courage to speak up about something. If you ignore it or make your team members feel as though they aren’t capable of improving the situation, that’s a quick way to avoid having them pose a suggestion the next time you ask for help.
The Role of Software in Project Management

While creative projects predate modern computing, it doesn’t make creative project management software any less important. In fact, with the increased turnaround and efficiency that every client has come to expect, managing a creative project without any assistance from technology would be next to impossible.

Not all creative project management software is created equal. There are a few key components that take a management platform from adequate to superlative:

Communication

Again, here is the recurring theme of communication. Software can be useful for both discussion within your team as well as when you need to interface with the client or other stakeholders.

Intra-Team Discussion

Working with a team of creatives, you can imagine that, at times, communication becomes a bit dysfunctional. While that’s the nature of the beast, you still want to have a firm grasp on what is going on within the team on a larger scale.

When you have a platform that can facilitate communication among your team and keeps record of everything, this can help you quickly get into the details of any specific portion of the project. Because the communication history is embedded in the software that also contains your client interactions, you can monitor the scope and direction of the project in order to make sure that you are not deviating from the plan.

Working with the client

When you have a deliverable to present to the client, you want to make sure that you have addressed all of the important parameters. Interfacing with the client through a software platform can help you maintain some integrity of the conversations so that you have easily accessible back-up if the client claims that you didn’t deliver what was requested.

On a more positive note, it again gives you the opportunity to have all of the communication on the same platform on which you are presenting deliverables and working within the team. When you need to review project scope, or look over metrics from the client prior to a brainstorming session, all of that information is in the same place.
Help with Administration

Administrative tasks can be mundane, but they don’t need to be difficult. For example, when you need to work with your finance and accounting personnel, it can be tricky to pull open the various pieces of information across multiple programs. Having everything integrated into the same creative project management software platform can save you time and hassle when you need to focus on your project management duties.

Budgeting and Reporting

This could fall under an administrative task, but it’s something that not every kind of project management software is capable of and is quite important on its own. During and after the project, when you want to review the budget parameters, using a software that integrates all of the reporting and recording features can make your life a lot simpler.

In addition to budgetary considerations, time reporting and resource management are crucial to long-term project success. While you might have the opinion that your project team is exceeding expectations, without the ability to run the reports that substantiate your claim, you may have a hard time convincing the CEO of that.

Revenue Forecasting

Another important function of project management is revenue forecasting. Without forecasting, the future is unknown, and it becomes harder to make higher-level decisions regarding personnel changes and capital resources. You can use revenue forecasting in order to make a case for adding to your team within a defined timeframe, as backed by the revenue numbers you present.
The Role of Communication in Creative Project Management

Your stakeholders need to stay informed about the status of the project. But it is equally important that there are discussions between the internal and external sides as needed. A project manager must take on a great variety of responsibilities throughout the life of his or her projects, and facilitating communication between the different groups of stakeholders is only one such duty that can be easy to forget about.

There are two painless tips for engaging your stakeholders. By making use of each of them, you can be assured that your internal stakeholders will interface with your clients and other invested external parties.

Build Trust

When you address the stakeholders, you want to gain their trust. The easiest way to do this is to maintain transparency at all times. It might seem like a good idea to always paint a rosy view of the project, but it’s much better to be upfront about any issues.

When you show your stakeholders that you are always going to be honest with them, they’ll find it much easier to trust you. The correlation between trust and open communication is quite strong, and this allows your internal and external stakeholders to talk openly with each other about the state of the project as well.

Actively Encourage Ongoing Communication

After your stakeholders have put some trust in you, they’ll be able to communicate easily. But they might need some encouragement here and there.

It shouldn’t be a primary responsibility of yours to make sure that the internal and external stakeholders are communicating on issues. But it does fall to a project manager to oversee all aspects of the project, which includes managing relationships with stakeholders. So while it may not be your ultimate priority all of the time, it should be among your list of things to stay on top of. It would also be a good idea to periodically check in with your internal stakeholders to make sure they don’t have any questions about anything in general and then ask about the latest conversation they had with the client and anything that you might need to address there. In that way, it’s an innocent introduction to the topic and allows you to encourage the ongoing communication without seeming pushy or demanding.
Conclusion

Take a moment to consider the last creative project that you managed. Can you recall any areas that could have benefitted from the strategies outlined above? How about any successful moments within the project that came as a result of your managerial foresight?

Use these as starting points when you move forward with the next project. Consider what actions you could have taken before the project started, while working with your team, and after the project was completed. If you haven’t already integrated creative project management software into your toolkit, you can also examine the ways that it might have improved your team’s efficiency. And don’t forget about the communication aspect within your projects. Were there any areas in which you experienced a communication breakdown? Could that have been avoided by any planning before the fact? While contemplating these questions, use the knowledge you’re gaining in order to improve yourself and your team for the next round.

Now that you have the tools to manage your upcoming creative projects even better than the last, don’t let them go to waste. Keep investigating areas to improve and work with your team in order to devise a solid framework for success.