Projects are an everyday part of being a packaging professional. You are either leading a project, participating in a project, or consulting on a project. Have all your projects followed the same process? I have found that each project is unique with its output, but at the root it is basically the same process repeated.

Not every project needs to include every step that the Project Management Institute suggests the process should follow. I would say the official process is more of a guideline. In my experience, all projects should include five key elements to get you off to a good start and set yourself up for success.

1. Define your scope, a.k.a. project. You need to understand what is and is not part of the expected outcome. Part of this phase is to collect requirements of the project and identify risks. What does the product need to accomplish? Does it need to stand? Does it need to pass drop and shipping tests? Is it for retail or other users? Are there security issues? Knowing these answers will help you create your requirements and know your goal. Knowing the specific criteria will ensure you meet the needs of the project.

2. Manage the “big three”—time, scope, and budget. Obviously, all three of these are equally important. A variation in one will absolutely affect the other two. When one of these three areas gets off even by a little, you need to make accommodations to rebalance the triangle. In some cases, adding to the budget can reduce your time, while at other times, changing the scope can reduce time and reduce part of the budget. It is here that you can estimate time and costs associated with the project. Knowing these estimates can help you establish which items are on the critical path. Critical path items are the activities that represent the longest path through a project and ultimately determine the shortest time possible to complete this task. Know that all changes would need to be approved before they can be applied. Changes to the triangle should not be taken lightly.

3. Understand your stakeholders. Who is this project intended to serve and what are their requirements and expectations? Who are your actual team members/stakeholders? Keep in mind that this list includes everyone who is part of this project. Think about all the people who are being consulted or served, all the designers, marketing and sales, etc. The list can be long, but knowing who the players are can solve any potential issues that arise.

4. Communicate. Establish your communication channels and methods. Will you schedule conference calls? Will you send email updates daily or weekly? Establishing this will create a sense of importance and formality to the project. This will also establish predetermined ways of giving status updates to all team members and stakeholders. Communication provides you the ability to manage the big three—time, scope, and budget. It is with communication that any modifications can be adjusted before they become larger issues. Communication will also document milestones reached along the project, and in reaching different milestones you are able to validate the scope of your project.

5. Closing statement or document. This is often a forgotten part of a successful project, and I believe it is truly one of the most important steps. We learn many valuable lessons on the journey of a project, and these lessons are best to be passed on. No need to reinvent the wheel, as they say. Documentation of the lessons learned can be shared with others so successful processes are continued and any challenges that were encountered can be reduced on future projects.

Following these five elements will help your current and future projects to be successful. Creating a system that works for you and your company will promote positive experiences for all project stakeholders. Work toward creating a way for them to be standardized and archived for future use. Also, know that this one project may be part of a much larger project or portfolio and any deviation may affect many other elements. We all have heard the phrase that knowledge is power, and this certainly applies to project management. Good luck and much success to you on all future projects. PW