

# SURVIVAL GUIDE

**FOR NEW PROJECT MANAGERS**



**HOW TO SUCCESSFULLY  
RUN AND MANAGE YOUR  
PROJECT USING JIRA  
SOFTWARE.**



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# INTRODUCTION

More than ever, organizations everywhere are counting on project leaders to develop high-performing teams and innovate at speed. In fact, Project Management Institute (PMI)'s [Pulse of the Profession® survey](#) has found that professionals in all roles are hired to manage projects, even without formal PM training.

So, if you find yourself handling a project manager's role, you've joined a growing community of professionals who are on a greater mission to drive business growth and level up their careers.

But managing projects isn't for the faint of heart, especially if you're dealing with cross-functional work. Misallocated resources, scope creep, and all kinds of unexpected pitfalls can quickly jeopardize your success.

Fortunately, as demand for skilled project managers increases, investments in project management technologies are expected to grow. According to PMI, 49% of Pulse of the Profession® surveyed leaders prioritize technology advancements as the key to project success.

Among countless PM solutions, Jira Software has emerged as the clear leader for cross-functional projects. Designed for any team, Jira helps new project managers like you navigate project complexity with its powerful features.

That said, technology is merely a tool. Ultimately, it's YOU who your teams depend on to lead them to project success.

**From initiating to closing a project, this survival guide will help:**

Equip you with project management fundamentals

Sharpen your project management tools

Gain critical survival skills for project managers

Understand core project management frameworks

Exploit the power of Jira Software to manage projects at ease

By the end of it, you'll be ready to thrive in your new role and crush every project like a pro!

**PART I**  
**GETTING**  
**STARTED IN**  
**PROJECT**  
**MANAGEMENT**



# CHAPTER 1

# 5 ESSENTIAL SKILLS FOR NEW PROJECT MANAGERS

Whether you're a project manager by accident or currently on the path to becoming a professional one, start by assessing your skills before traveling into the wilderness.

Beyond technical know-how, project managers benefit from the following soft skills:

- Leadership
- Communication
- Organization
- Decision making
- Problem solving

The Project Management Institute also ranks these abilities among the highest [project success factors](#). As with any profession, having formal training will prepare you for the job. But to drive project success, you need to polish non-technical skills as well.

In reality, you will encounter many scenarios that don't exist in a project manager's handbook. With complex workflows and processes, especially at the enterprise level, you have to handle a diversity of teams and manage conflicts when things fall apart. These are times when interpersonal skills can make or break a project.

With that in mind, below are the key characteristics of a project manager.



# CHAPTER 1

## 5 ESSENTIAL SKILLS FOR NEW PROJECT MANAGERS

### **VISIONARY LEADERSHIP**

Imagine spending hours of work on a project, only to find out your teams are sidetracked from the original scope - all efforts have gone to waste. That's what happens when you miscommunicate (or entirely leave out) the project vision and goals.

As a project leader, your most important responsibility is to cast a vision for your team and set the right goals to lead the team towards the desired destination. If the project is already underway, don't just jump in and administer work right away. Take the initiative to re-establish the scope and deliverables. At the same time, you can ensure that the current project vision is aligned with the business priorities.

As for new project initiation, be crystal clear about your vision to secure buy-in. Vision casting helps to create the right conditions for success. Instead of just delegating tasks, communicate the big picture and break down specific goals to give your team the context for their work.

The common thread to effective team management and project leadership is communication. Conducting meetings and facilitating cross-functional collaboration, brainstorming ideas and managing conflicts—they're all part of being a project leader. Depending on the audience to whom you are delivering the information to, there will be different goals and methods.

Try to put yourself in their shoes and anticipate their information needs; then determine the best channel to broadcast this information, e.g. via documentation or the intranet.

As a project manager, you are a connection point between clients and teams. So, make sure to keep them in the loop as the project takes shape, so you can address early concerns and maintain an unhindered flow of information.

### **EFFECTIVE COMMUNICATION**

## CHAPTER 1

### 5 ESSENTIAL SKILLS FOR NEW PROJECT MANAGERS

# ORGANIZED AND DETAIL- ORIENTED

Part of being a leader is to keep track of all the moving parts of the project. Don't let yourself be drowned by a deluge of emails between teams, stakeholders, and clients. Consider establishing a knowledge repository where anyone can refer to at any point.

If you fail to capture important information properly, it may get lost in translation. So, make sure you stay on top of everything, be it a work update or a task sign-off. Pay attention to any hiccups along the way to ensure that your teams don't stray off the project roadmap. And if there are changes, make adjustments accordingly.

As far as cross-departmental collaboration is concerned, task prioritization is key to problem-free execution. Every team has its own list of things to do. Your role is to determine which tasks take priority over others in order to orchestrate the ideal workflow.

Many new PMs fall into the trap of wanting to accomplish too many things at once. Just don't. The ability to prioritize allows you to plan, manage, and run a project more efficiently. With a clear timeline, you can tactfully decline ad-hoc tasks or sudden requests if they are of lower priority.

# RATIONAL PRIORITIZATION

There will be growing pains as the project scales. The last thing you want to do is bury them. Instead, look for symptoms, bring conflicts to the surface, and resolve them before a crisis happens. But if it does, how do you determine the best course of action?

While it's a subjective matter, there are certain rules in problem solving for project managers.

Seek to understand the problem, but never to discover the root cause (at least not immediately). Your number one goal should be to get the project back on track. So, gather data from past changes and act upon them.

# DECISION MAKING AND PROBLEM SOLVING

## CHAPTER 2

# SURVIVAL TOOLS FOR NEW PROJECT MANAGERS

To navigate the complexity of any project, you need more than just strength. You need software to move forward quickly in project planning, monitoring, and reporting.

Modern project management tools equip you with the ability to visualize the team's workflows, stay on track of the development process across functions, and more.

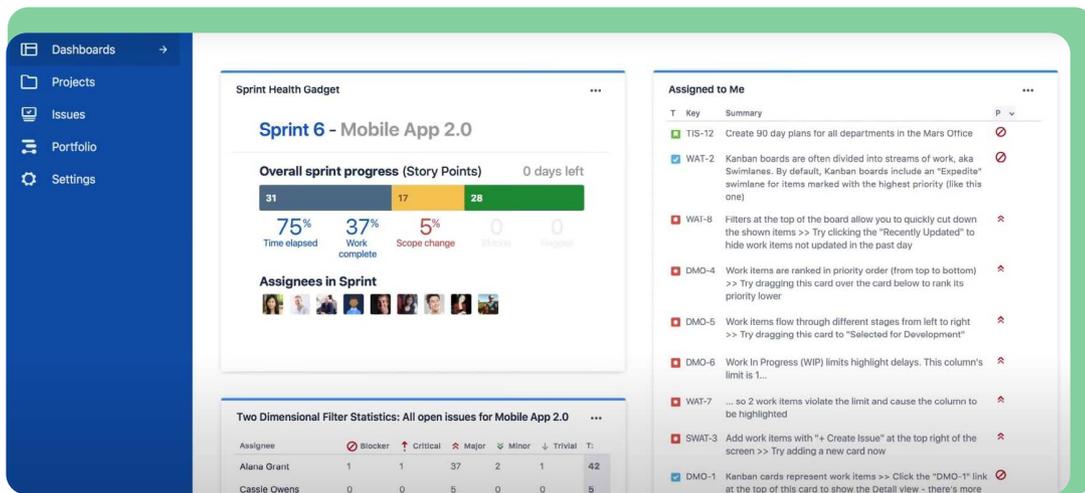
Below, we'll walk you through must-have PMP tools to deliver successful projects.



# CHAPTER 2

## SURVIVAL TOOLS FOR NEW PROJECT MANAGERS

# REAL-TIME DASHBOARD



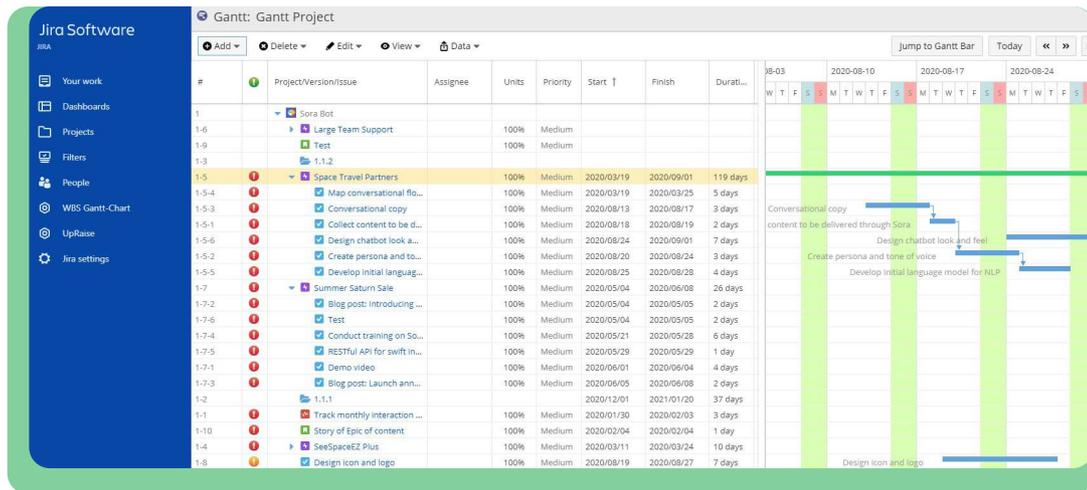
Dashboards are key to monitoring project progress. Unless you're an Excel veteran, don't even think about building a datasheet for reporting.

With real-time status updates on your project dashboard, you'll have the insights into project activities as they happen. Some of the key information on a dashboard include: budget, workload, and schedule. You can typically customize these properties to generate the data you need for stakeholder communications.

# CHAPTER 2

## SURVIVAL TOOLS FOR NEW PROJECT MANAGERS

# GANTT CHART



Created by Henry Gantt, the Gantt chart laid the foundation of modern project management. It's the time-tested scheduling diagram trusted by PMPs since the early 1900s.

As part of the project management toolkit, a Gantt chart allows you to:

- Break down a project into bite-sized tasks.
- Create linked tasks and manage dependencies across teams.
- Communicate cross-functional requirements to help teams see the impact of their work.
- Visualize and monitor project progress against its original timeline.
- Avoid conflicting workflows or resource misallocations.
- Identify critical handoffs or important project milestones.

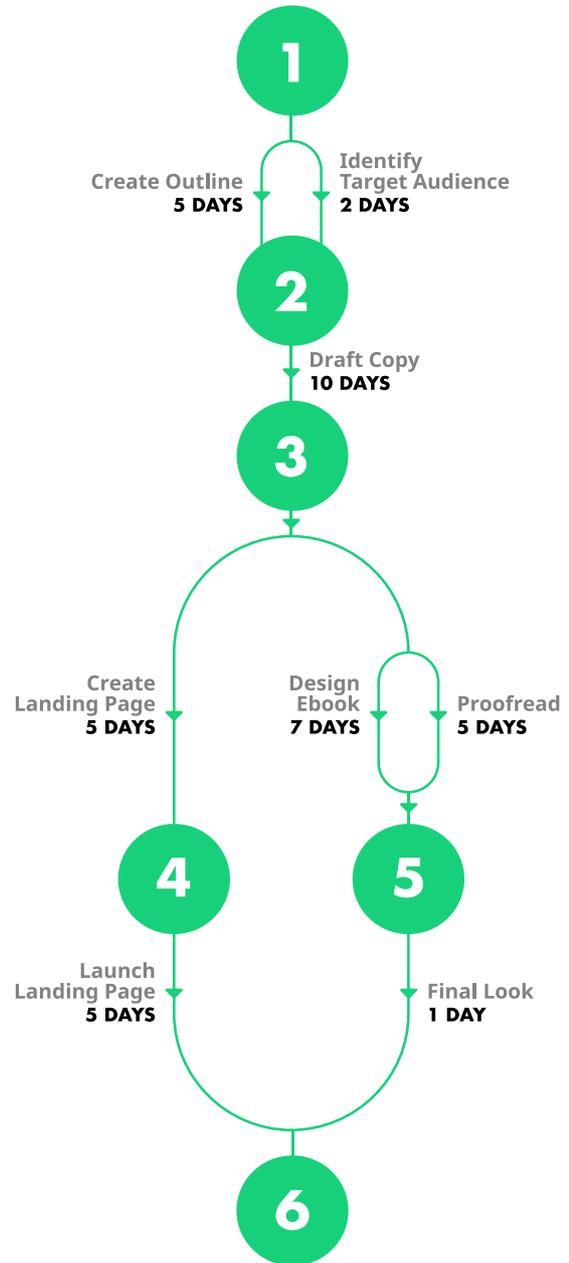
**Take it further:** [The Ultimate Guide to Project Management with Gantt Charts](#)

# PERT CHART

PERT stands for Program Evaluation and Review Technique. It's a popular project scheduling technique, presented as a network diagram, to show the interdependencies of tasks.

Unlike Gantt charts, which drill down to the granular project timeline, PERT charts are commonly used for high-level project planning. They allow you to visualize all the tasks involved, along with the time needed to complete each task.

Each node (circle) presents a single task, and the numerical value indicates the task's order in the process. These nodes are connected by the arrows, showing the time it takes to advance to the next step. The direction of the arrow signals the sequential order of these tasks. Based on that, you can plan a workflow with the minimum time needed to complete the project.



# WORK BREAKDOWN STRUCTURE

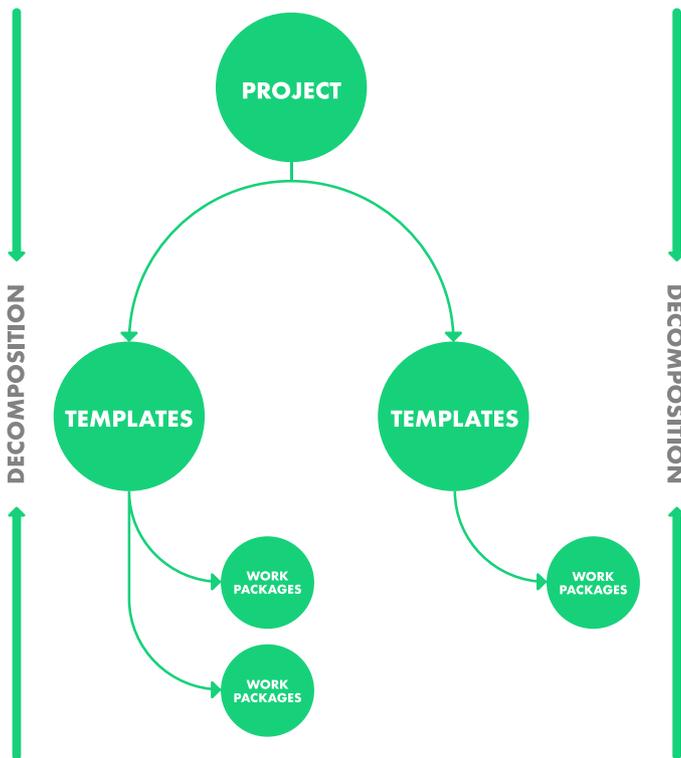
With a work breakdown structure, each assignee is aware of his task and how it fits into a bigger picture. Simultaneously, you can effectively coordinate workflows in a logical order, while monitoring potential roadblocks.

By focusing on deliverables, WBS helps eliminate unnecessary work that is lower in priority.

Here are some of the benefits of a WBS:

- Gives you a granular view of project tasks and subtasks
- Shows you actual project progress towards a major milestone
- Defines specific deliverables and outcomes
- Allows team members to focus on important tasks first
- Avoids conflicting workflows and resource misallocations
- Avoids changes to the project scope

**Pro Tip:** You can combine the WBS with a Gantt chart to schedule tasks and manage dependencies on a timeline.



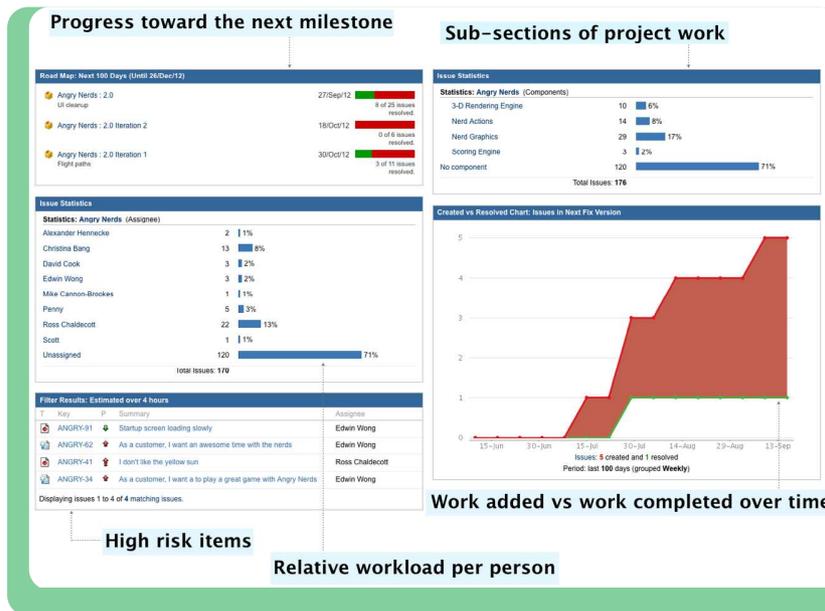
# CHAPTER 2

## SURVIVAL TOOLS FOR NEW PROJECT MANAGERS

# PROJECT REPORTING

Reporting is more than just providing charts and graphs. It offers data points that will allow you to make informed decisions to ensure current and future project success.

## STATUS REPORTS



These are essential to managing your stakeholder expectations while controlling project risks. A good status report includes:

- Project overview (summary, budget)
- Issues and risks (problems, resolutions)
- Project milestones (planned, completion)
- Success metrics (cost, scope, time)

Typically, PMs leverage the project dashboard to get a quick overview of the project. You can customize your report data points based on your reporting goals. Above is an example of Jira project reporting.

# RISK REPORTS

Created from team inputs, the risk report communicates the critical issues that require management attention. It captures the following information:

- The registered risks and action plan to mitigate them
- Team's performance data
- Project schedule progress
- The status of each deliverable (in accordance with risk management)

Here's a sample Jira risk report powered by [Risk Register](#).

T	Issue Key	Summary	Inherent Risk	Treatment	Residual Risk
1	MOON-1	The rockets may not fire	MEDIUM	MOON-7 Prepare backup igni... ↑ TO DO	LOW
1	MOON-2	Rocket failure after launch	MEDIUM		LOW
1	MOON-3	Navigation systems misaligned	HIGH	MOON-10 Attach turbo encab... ↑ DONE MOON-8 Deploy unilateral ph... ↑ TO DO MOON-9 Synchronize cardin... ↑ IN PROGRESS	MEDIUM
1	MOON-4	Astronaut fatigue	MEDIUM		MEDIUM
1	MOON-5	Return delayed by fuel depletion	LOW		LOW

**Take it further:** [Agile Project Reporting: Are You Doing It Right?](#)

**PART II**

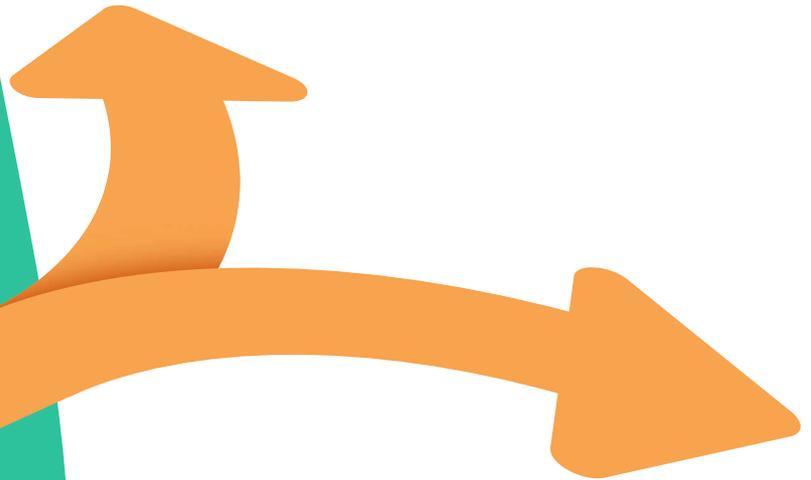
# **THE COMPLETE PROJECT MANAGEMENT TOOLKIT**



# CHAPTER 3 CHOOSING THE RIGHT PATH: WATERFALL VS AGILE

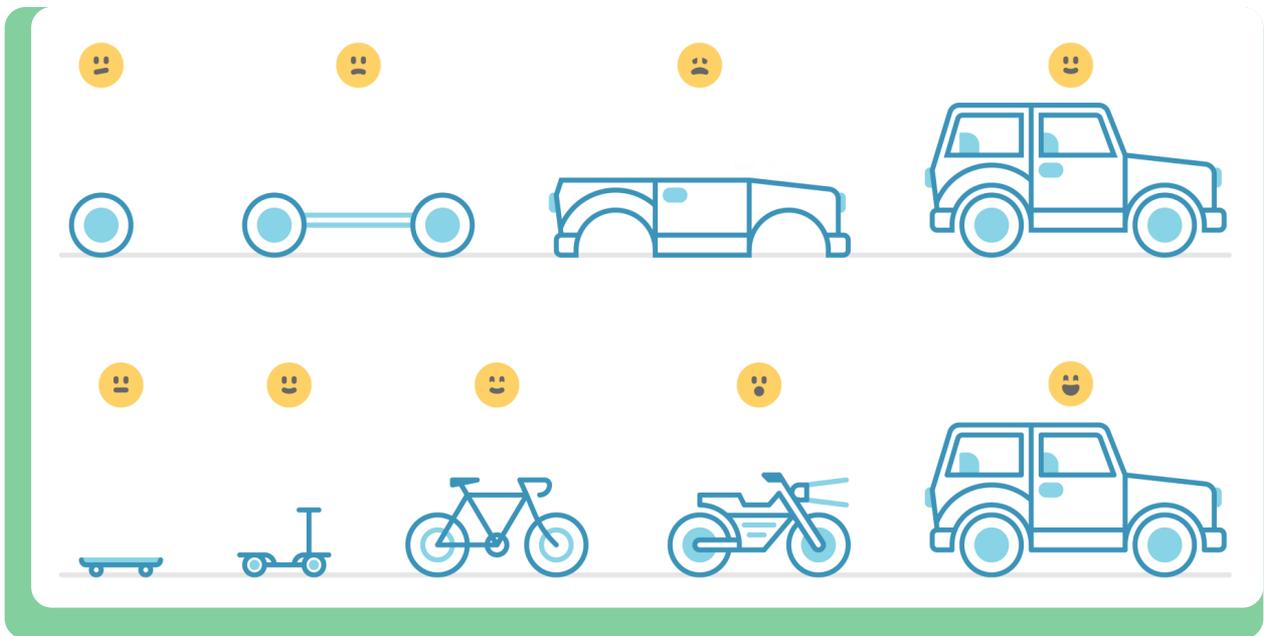
Not all projects are created equally. In the PM role, you will need to identify and apply the right project management framework to ensure success.

Complex projects with regulatory restrictions like construction often rely on a waterfall model (think Gantt charts), while IT or software development resides in an agile world (think Jira).



# CHAPTER 3

## CHOOSING THE RIGHT PATH: WATERFALL VS AGILE



Agile is a set of values that promotes incremental development, rather than all at once, through cross-functional collaboration and (almost) real-time user feedback. This means to focus on delivering a minimum viable product and release incremental improvements as you gather more feedback.

In the grander scheme of work, agile is a leadership philosophy that encourages collaboration, team autonomy, and accountability.

In contrast, waterfall depicts a sequential development process to deliver the end product to customers. As such, every task is dependent on its precedent task, and there's little leeway for changes.

That said, the granularity that comes with waterfall practices does have its positive aspects. Let's face it, how can you communicate the big picture to the team, monitor project progress, and prioritize tasks without a concrete plan?

As a project manager, you're responsible for implementing the right framework that can fulfill the project's requirements. You may choose agile methods like Scrum or Kanban to deliver IT projects, or traditional waterfall to run marketing campaigns. No matter where you stand, the best approach is right within your project management software - Atlassian Jira.

While Jira is designed for agile teams, it's versatile enough to accommodate waterfall-like project management approaches as well. The software allows you to blend the flexibility of agile with the granularity of waterfall. And by merging the two methodologies, you can achieve success with iterative development without compromising the big-picture plan.

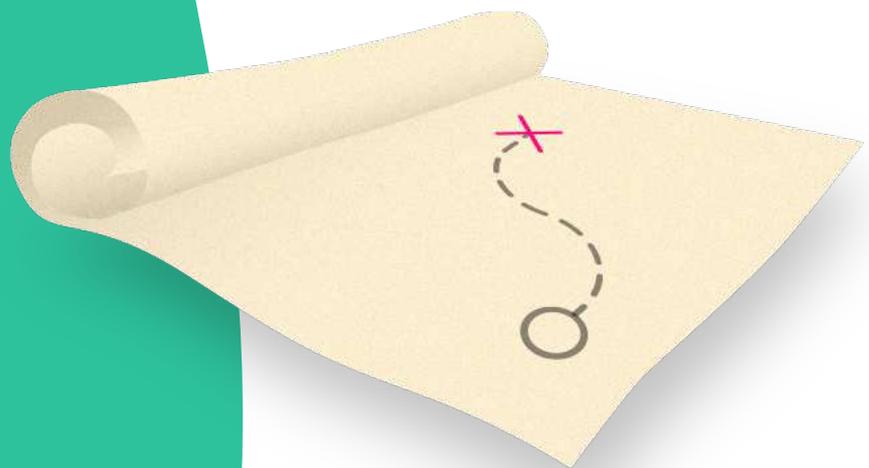
We'll discover more in Chapter 3.

**The Agile Coach:** [Atlassian's no-nonsense guide to agile development](#)

You're making it through the project management role just fine! Now, continue to build your way up to project success with just a little planning.

## CHAPTER 4

# SURVIVAL PLANS FOR SUCCESSFUL PROJECTS



# CHAPTER 4

## SURVIVAL PLANS FOR SUCCESSFUL PROJECTS

# PROJECT PLAN

A plan is to a project manager what a compass is to a jungle explorer. As previously mentioned, a project plan is far more than a to-do list. It sets the vision, ensures stakeholder buy in, and keeps everyone on track as the project takes shape.

The basic components of a project plan consist of:

1. Why did we create this project?
2. When is the due date?
3. Who are the stakeholders?
4. What are the (expected) deliverables?
5. How will they be delivered?

A project plan can be documented following this basic template:

The screenshot shows a document editor interface with a project plan template. The template includes a table for driver, approver, contributors, and stakeholder; a table for objective, due date, key outcomes, and status; and a section for a problem statement.

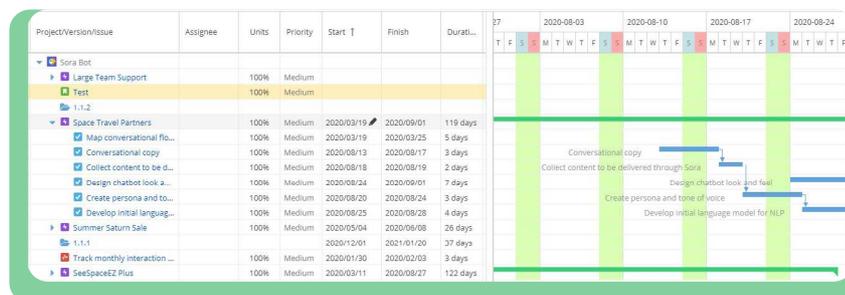
Driver	Approver	Contributors	Stakeholder
@mention the driver			

<b>Objective</b>	Summarize the objective in one sentence
<b>Due date</b>	Jan 1, 2019
<b>Key outcomes</b>	List expected outcomes and success metrics
<b>Status</b>	NOT STARTED

**Problem Statement**  
Describe the problem and its impact. Include the hypothesis that's driving your work ("We think X will do Y, and we'll know we've succeeded if Z").

Alternately, many project management professionals (PMPs) lay out the project plan on a Gantt chart. Check out how it looks in Jira:



# COMMUNICATION PLAN

A communication plan does exactly what it suggests - to communicate the purpose of the project, keeping the stakeholders and team members aligned on a common goal. PMs also refer to it as the project poster.

Don't get a project plan and project poster mixed up. Unlike its sibling, a project poster is often a one-pager that summarizes the following points:

- The problem you're solving and why it matters to the business and to customers.
- The complete project information to get buy-in and guide teams towards the end goal.
- Potential risks that may affect the project success.

Project poster

How does this project fit into your broader strategy?	<b>Team</b> Project owner: @Chan Kim Team members: Add the team members	<b>Status</b> PENDING
---	---	--------------------------

Problem Space	
Why are we doing this?	Problem statement:
How do we judge success?	Impact of this problem:
What are possible solutions?	Draft specific and measurable goals before progressing to the "Ready to make it" section

Validation

**Tip:** No time to create documentation from scratch? Access the [Confluence template](#) bank to save time

As you've learned previously, Jira is a dynamic software with solutions for both agile and waterfall project management. In this chapter, you'll learn the key Jira features that will help you achieve project success in next to no time.

## CHAPTER 5

# JIRA SOFTWARE TO THE RESCUE



# CHAPTER 5

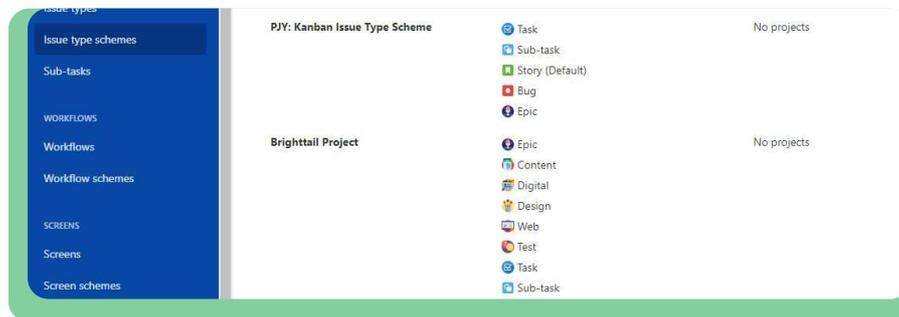
## JIRA SOFTWARE TO THE RESCUE

### ISSUE TYPES

In essence, a Jira issue represents a task to be done. You can give each task more context by using the associated issue type. For non-IT teams, you can customize issue types and fields to reflect the actual taxonomy in your organization.

<b>BUG</b>	A bug is a problem which impairs or prevents the functions of a product.
<b>EPIC</b>	A big user story that needs to be broken down.
<b>SUBTASK</b>	A subtask is a piece of work that is required to complete a task.
<b>STORY</b>	A user story is the smallest unit of work that needs to be done.
<b>TASK</b>	A task represents work that needs to be done.

Depending on your team structure, you can customize Jira issues to reflect the way your team actually works. For instance, here's a new issue scheme created by a marketing department:



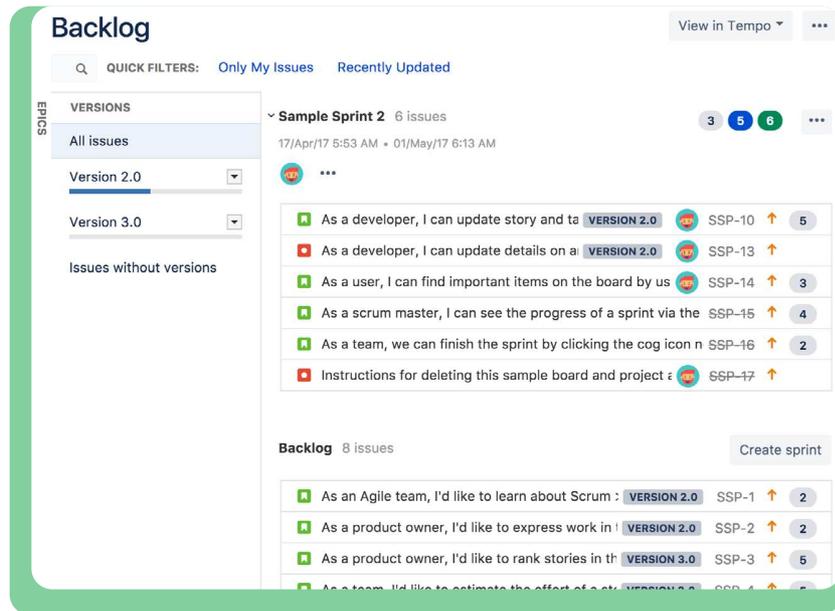
# CHAPTER 5

## JIRA SOFTWARE TO THE RESCUE

### BACKLOG

Once you have defined what needs to be done, these issues will be stored in a backlog. There's no limit of pending tasks in a backlog. Instead, your team can select the tasks to work on according to the set timeline.

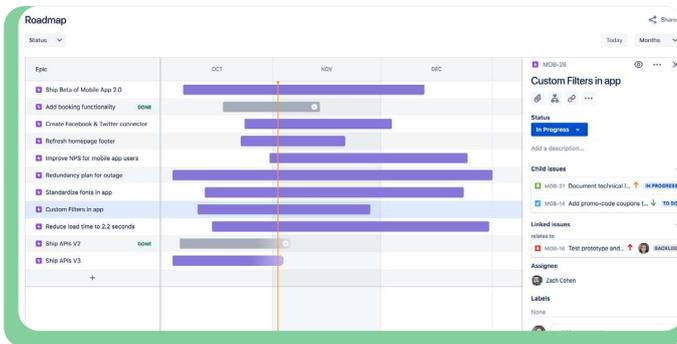
Jira backlog essentially replaces Excel sheets, so you can plan and schedule projects and monitor the progress in real-time.



# JIRA ROADMAP IN NEXT-GEN PROJECTS

Roadmapping is a powerful technique to support strategic and long-term planning. It allows everyone working on the project – from management to individual team members – to determine the desired project outcome and mark important milestones needed to reach the end goal.

Jira roadmap, available in Next-Gen projects, is a simplified version of a Gantt chart. With it, you can easily track the project progress without losing sight of the big picture.

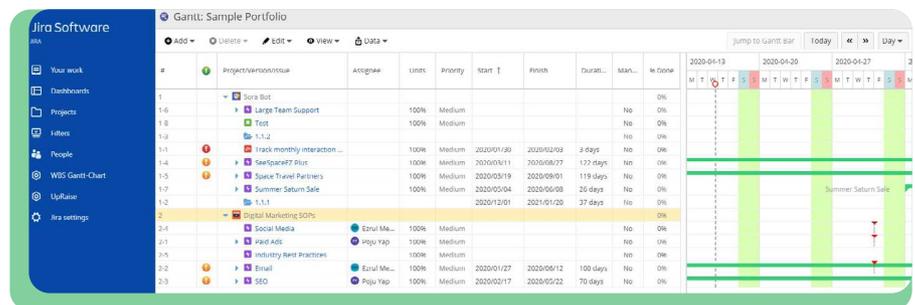


What's missing from the roadmap is dependency management. While offering great project visualization capabilities, Jira doesn't show child issues on the roadmap. As a result, these issues can easily fall through the cracks and lead to scope creep.

That's where WBS Gantt-Chart for Jira comes in. With this app, you can enjoy the benefits of Gantt charts right within your Jira instance. Plus, the app comes with the work breakdown structure component. Which allows you to plan and assign tasks in a visual hierarchy, add dependencies and track the overall project progress in a single view.

You can easily combine Scrum processes with Gantt-based scheduling, making big-picture planning a breeze! Note that you don't have to commit to a fixed development. If there are changes, simply update your roadmap without disrupting the current workflow.

Even better, if you need to manage multiple projects in Jira, simply create a Gantt timeline with the portfolio-level view across all Jira projects.



This powerful feature allows you to manage project schedules and allocate appropriate resources in any environment.

# **BUILDING YOUR JIRA DASHBOARD**

What about project reporting?

You don't need to generate multiple reports to communicate the project status with stakeholders. Instead, utilize Jira dashboard to get a quick overview of:

The tasks status  
in a current  
sprint

The team  
activities

And more...

To make the most of your Jira experience, you can customize the dashboard with several gadgets. Here's the complete list of available gadgets. At ground level, you might want to consider the following components:

Issues statistics  
by status and by  
priority

Issues assigned  
to the user

Important issues  
and sprint status

With Jira dashboard, you can gather important information essential for project management without having to go through complex reports.

## **THAT'S IT!**

You're now well on your way to managing projects successfully with Jira. While the software helps to streamline project management, don't forget to equip yourself with more technical PM knowledge to further improve project delivery.

## WHAT YOU'VE LEARNED BY NOW

# CONGRATULATIONS

You've completed the fundamentals of project management in Jira. Before you put your knowledge into practice, let's do a quick recap.

First, being a project manager has a lot to do with managing teams. Effective communication, compassion, and collaboration are the key competencies of a great PM. And the most important principle for successful project leadership is to keep yourself laser focused on the vision to align everyone around a shared goal.

Next, we covered the tools needed to plan, track, and deliver successful projects, basically everything you need to stay organized. So, take time to familiarize yourself with common PMP knowledge like working with Gantt charts and work breakdown structure.

In the second half of the ebook, you also learned about the basics of project management methodologies, particularly agile and waterfall. And how you can simplify project complexity with the help of Jira and WBS Gantt-Chart.

But keep in mind that the best way to learn about project management is while you're in the thick of it. So go ahead and get your hands dirty. Be the project leader that your team can rely on to get things done.

For more practical tips and advice on project management in Jira, [subscribe to our blog!](#)

