a practical roadmap
for learning project management stress-free

free guide

initiate plan execute close

collaborate

version 1

the practical project roadmap
a mini-guide

This roadmap is for people working on projects. It streamlines the complexities of project management into accessible steps, helping you
- align your goals and actions
- stay organized and focused
- anticipate and adapt to challenges
- achieve meaningful results with confidence

initiate → plan → execute → close

collaborate

We created this roadmap for those
- suddenly thrust into the role
- unsure or insecure about their skills
- too busy
- or, curious about the role

It explains key project management concepts in plain language.

We also weave in crucial collaboration skills because projects are achieved only through the efforts of many.

initiate

charter

stakeholder analysis

*understand what success looks like
and get people aligned*

charter
what are we trying to achieve and why does it matter
- identify key values, outcomes, timelines and resources
- get stakeholders on the same page

stakeholder analysis
who needs to be involved & how do we keep them engaged
- identify those affected or involved in the project
- assess their influence, interests and attitudes
- prioritize how to engage them

initiate plan execute close

collaborate

plan

scope

work breakdown diagram

turn the project vision into an actionable blueprint

scope
what exactly are we delivering
- establish boundaries for what is included and excluded
- ensure clarity to prevent scope creep

work breakdown diagram
how can we make this big goal achievable
- break the project into manageable chunks
- identify milestones and interdependencies

initiate → plan → execute → close

collaborate

plan

resource list
risk tracker
timeline and schedule

resource list
what do we need to succeed
- identify the people, tools and materials needed
- check for availability and address gaps

risk tracker
what could go wrong and how will we handle it
- identify and prioritize potential challenges
- develop approaches to mitigate

timeline and schedule
who needs to what and when
- develop a timeline for milestones and tasks
- assign responsibilities and deadlines

initiate | plan | execute | close

collaborate

execute

monitor & troubleshoot
change tracker

deliver results while adapting to changing circumstances
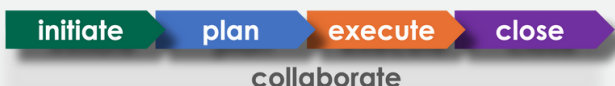
monitor & troubleshoot
are we on track
- monitor progress regularly
- address problems as they arise and adjust plans if needed

change tracker
how do changes affect the plan and outcomes
- identify situations that impact the plan, outcome or timeline
- adapt while protecting the project's value

initiate | plan | execute | close
collaborate

close

key learnings

capture lessons learned to improve future projects

key learnings
what worked well and what could we do better next time
- reflect on successes, challenges and opportunities for improvement
- find ways to use in future projects

initiate plan execute close

collaborate

collaborate

communication
team building

work effectively with others to ensure success

communication
how can we effectively elicit and convey the right information
- actively listen to truly hear people
- adapt communication style so the message can be understood

team building
how can we create an environment where everyone thrives and contributes effectively
- encourage contributions and provide a safe environment for open discussion
- understand and address issues like missed deadlines by identifying factors such as drive, capacity or dependencies

initiate → plan → execute → close

collaborate

collaborate

conflict management

conflict management
how can we turn differences into opportunities for growth?
- recognize signs of conflict such as raised voices, disengagement or emotional reactions
- address disagreements constructively to find solutions
- focus on mutual understanding and shared goals
- use techniques like active listening circles, finding common ground and agreeing on steps to resolve disputes

initiate ▸ plan ▸ execute ▸ close

collaborate

summary

initiate
understand the high-level scope and timeframe

plan
layout required tasks and resources

execute
complete the tasks and produce the outcome

close
wrap-up loose ends

collaborate
communicate, build your team and handle conflicts

initiate ▸ plan ▸ execute ▸ close

collaborate

learn more about

other guides
PMEZ
webinars
workshops

by visiting

pmez.org