TeleGrow
Enhancing the Teleworking Digital
Skills for the Middle aged employees

Modules de formation sur le télétravail : La formation ultime au télétravail pour les formateurs professionnels

MEUS

Module 5: Outils numériques de gestion de projet

31/5/2022

Erasmus+

Index

1. Introduction to the topic

Project management is the way of structuring independent resources that are necessary to complete a project – human resources, financial resources, technological / material resources, etc. If this entire process relies on an online system, it might make it more efficient. The digitalisation of the managerial tasks also supports the possibility to handle tasks remotely, as it reduces the need to meet physically to organise the work while developing a project. Therefore, it is one of the fundamental pillars of teleworking, which explains why Telegrow course is dedicating one module to this topic.

Project management consists of planning, organizing, and dealing with the different transversal aspects of project implementation. It can include activities of allocation of resources, quality management, evaluation and risk, financial control, decision making, organisation of internal and external communication flows, etc. It supports greater efficiency in delivering products or services, improves the satisfaction and self-development of the team as well as its performance, increases flexibility, and enhances creativity.

We can distinguish different types of project management systems:

- general IT tools for various activities, such as word processing (Word, Google Doc, Open Office) spreadsheets (Excel, Open Office), databases (Access, AirTable), graphical editing (Gimp, Canva), communication, and chat (emails box, WhatsApp, Telegram) etc.
- IT tools dedicated to project management (Monday, Trello, Slack)

In this topic, we will focus on the presentation on the main digital project management tools currently available, their respective characteristics, and how they can help you to manage your project according to your needs.

2. Learning objectives

Upon the completion of this module reading, the learner will be able to:

- Deal with the main concepts of digital management and handle the vocabulary related to digital management, understanding terms such as planning, tracking, collaborating, monitoring in a digital context.

- Choose among different digital tools and platforms the most appropriate solution to manage project and working tasks according to the needs of each situation. Know the main features of each tool and its pros and cons.

- Perform self-monitoring and well-organized telework

- Organise collaborative online work with teams, and use collaborative online tools.

- Plan, share, develop and report work thanks to digital tools

- Handle basic concept of LEAN management online, tracking time and expenses

3. Learning contents

Chapter 1 – Project Management platforms – Automatization of daily routine tasks

The automatization of tasks consists in the application of modern technologies to reduce or eliminate the need for human intervention to complete a given task. You can experience many forms of automatization in your everyday life, like automatic payments, self-boarding, and ordering food on applications, among others. In project management, automatization of daily routine tasks, or unproductive tasks, is a great asset to increase both productivity and general performance. In this chapter, we will review some of the tasks that can be easily automated, how to do that, and what is the benefit behind such automatization.

→ Task management

Task management is the most time-consuming managerial duty to be automatized. In your daily routine, you must perform a series of tasks. Tasks management is about:
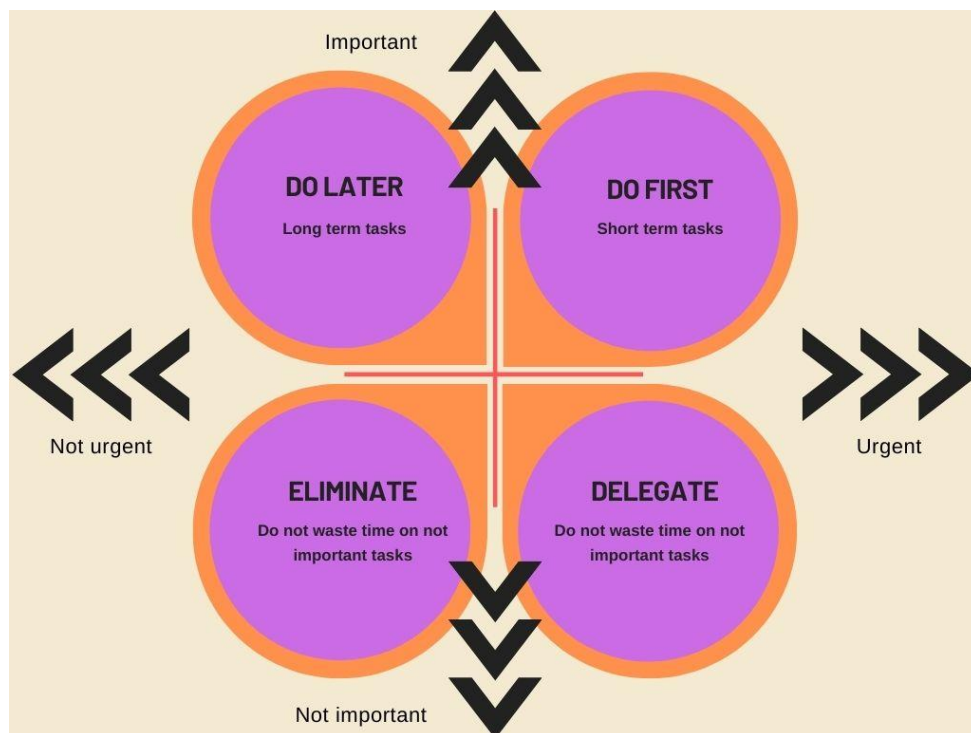
- Not forgetting any tasks that you are assigned with
- Collaborate with your team and share information about tasks
- Make sure you deliver tasks on time, and with high quality
- Be able to settle priorities

Different techniques can be used for task management, from the most basic to the most elaborated. The easiest way of managing tasks would be to prepare a To-do list. A To-do list simply consists of a list of things that one wants to get done. You can use for this a simple pen and paper, an Excel file, or a more elaborated application, depending on the degree of complexity that you need to address.

More elaborated task management applications enable you to set priorities in your tasks as well as establish the degree of emergency. The Eisenhower Matrix, also called the urgency importance matrix, helps you decide on tasks and prioritize them according to their importance and urgency, with the objective of sorting out the less urgent and importance by either delegating or not doing them at all.

Source: own elaboration

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Applications such as Trello, Nifty, or Asana, which we will detail furtherly, allows you to automate routine work and build a custom integration, add deadlines, and establish importance and priorities. They also allow you to share a working space within your team, so it supports collaboration.

→ Meeting scheduling

Meetings are sometimes difficult to set, as they involve different people with diverse agendas and require coordinating their schedules, which sometimes even come from different countries and time zone (especially in the case of online meetings). Using relevant applications such as Doodle and synchronised calendars (Outlook, Google Calendar) will reduce considerably the time spent on choosing a date. Then, as additional tips for efficient management of meetings, you should remember to:

- Prepare an agenda and share relevant information with the participants of the meeting
- Invite only people concerned with your topic
- Request participation
- Keep the meeting timing
- Prepare and share the results of the meeting (minutes)
- Follow-up on decisions taken during the meeting

→ Time tracking, or time management

Tracking time is an essential part of the management of any project, as it helps you to record how much of your time has actually been spent, prepare timesheets, and plan future projects as you will know precisely how much time you need for each task. Time tracking also let you visualize the tasks you must perform in a timeline, considering days off, holidays, meetings, etc. The time tracking feature support allows the user to clock in/out using computers or a tracker to record the start and the end of a task. Then, it can give you full feedback and analysis of the time you spent on each task. You might find more or less elaborated trackers, which request more or less intervention from your side to start the clock (manually or automatically). Finally, a time tracker can help you to create alerts when a task is falling behind schedule, or when you have to set priorities, especially regarding pending and urgent tasks. Some tools such as RescueTime or Forest are useful programmes that help you in improving your time management.

→ <u>Expenses tracking</u>

Expenses management platforms will help you to register all your expenses and keep your accounts on track. There are many applications available in the market, such as Fuell, Factorial, or Expensya. Most of them are offered as free to start or demo. Furthermore, there are also receipt scanning apps (Expensify, Neat) that can help you keep information from your receipts, and organise your daily expenses.

These different tools applied in the long term will support you not only in planning new projects, but also in reporting and analytics. The use of automatization tools enables you to record your tasks, times, and expenses and let you create reports and summaries with a few click to analyze a wide range of data regarding your productivity.

Chapter 2 – Internal monitoring and supervision

Before making a selection among the available digital management tools, it seems important to review the project and management related needs. Thus, in this chapter, we will remind you the basic elements of a project life cycle, and the main needs associated with the management of a project.

> Project life cycle <
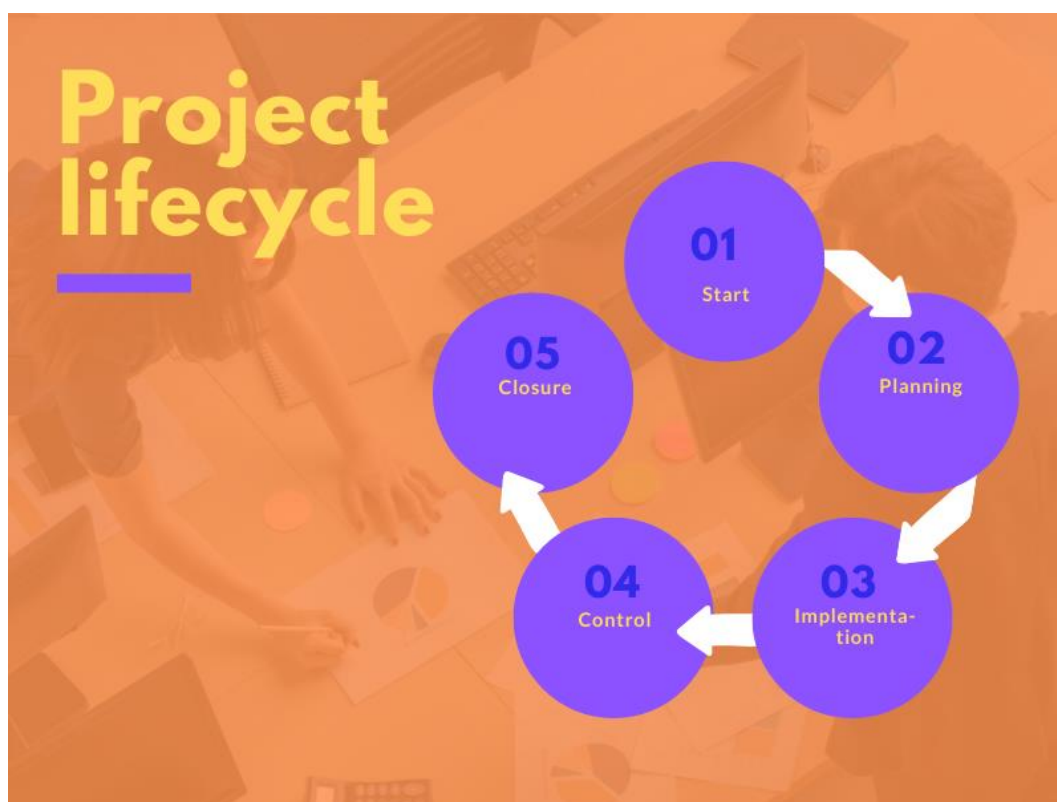
Source: own elaboration

→ Start

The project start, or initiation is the phase when you identify a need, or detect an opportunity, and think about how you could provide a solution to this problem or situation. During this step, you set the main objectives of your project, its general structure, and draw the main activities that will enable you to reach your goal. Regarding management, in this step, you need to undertake a viability study or

develop a business plan, where you identify the scope of the project, its main target groups and stakeholders.

→ Planning

Once you have validated your initial idea and decided to move forward, you need to plan the necessary work to reach your goals. During this phase, you will evaluate your needs in resources (human and material), divide the larger project into smaller tasks, build a team, and prepare tasks and assignments according to your team competences. Regarding management, in this phase, you need to work on project planning, budget, schedule, and anticipation of risks.

→ Implementation

The implementation, or execution phase, is the time when you put your plan into practice. This phase often includes the development of the team, stakeholder's engagement, and quality insurance activities, either on a formal or informal basis.

→ Control

The monitoring and controlling phase is about keeping an eye on the actual project development against your initial plan and taking corrective action if necessary. The role of the manager at this stage will be monitoring, and keeping work on track, organising the work among the team, managing timelines, making sure that the work is being implemented according to the plan and within budget, and controlling potential deviations. Communication will be very important during this stage, in addition to monitoring.

→ Closure

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Once the work is completed, you enter the closure phase. During this one, you deliver the final products, release the project resources, and determine if the project was successful. Often, you will need to report your achievement to your public, your funders, or team. Thus, you still have some major managerial tasks to perform, such as evaluation and reporting. The analysis of your performance might eventually lead to the detection of new needs and the initiation of new projects.

Thus, and considering these different steps, we can determine different managerial needs that can be supported by different digital tools at each stage of a project implementation.
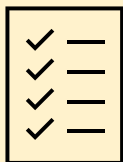
<div align="center">

> Managerial needs <

</div>

Here is a summary of the main managerial need that you might find. Then, we will review different tools and their respective features that answer these needs.

Brainstorming / Mental map (Miro)

For initiating projects, sharing ideas within the team, design of solutions etc.

Task management (To do lists, Trello, Monday, Asana, Microsoft project)

To keep work on the track, allocating tasks, recording progress

Time management (Gantt chart)

For setting deadlines and reaching deadlines, organise the workload in a timeframe.
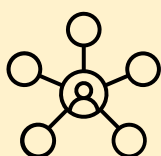
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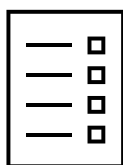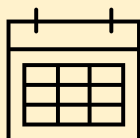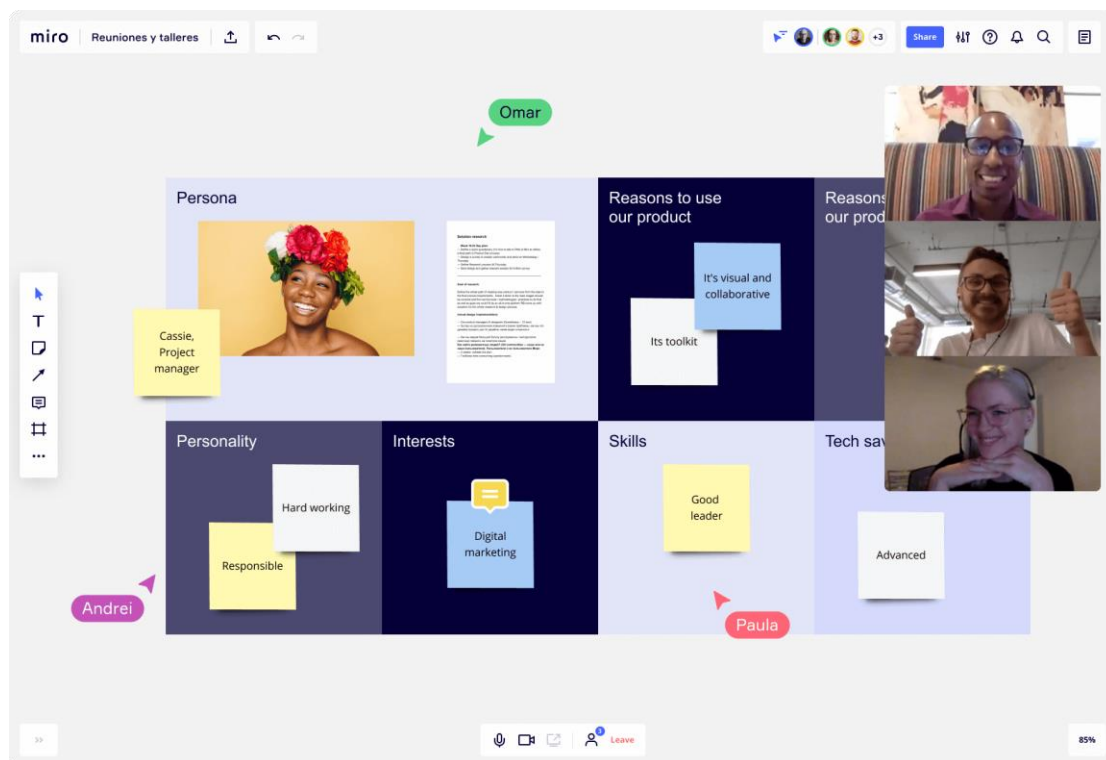|	**Project communication (email, chat, slack and Design tools)**
	Internal and external communication, within the team and with the stakeholders and target groups of the project. Here the need refer to the creation of a clear message and its distribution through the right channels.
	Files management (Drive, Dropbox, word2pdf, translators)
	For sharing documentation, working (simultaneously or not) on documents, and managing the formats and languages of the files.
	Collaboration (Asana, Drive)
	To share tasks and work simultaneously on a common project as a team.
	Planning (Gantt chart)
	General overview of the project, its timeline, milestones and advancement, and the next tasks needed to complete it.
	Scheduling / Calendar (Doodle)
	To set up meetings, for instance.
	Reporting (Drive, Google forms, Expenses trackers)
	Evaluation of the project is part of the project lifecycle, it is important to analyse general data related to its performance to know if it was successful (quality survey), how much it costs, and report.

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Chapter 3 – Multitasks managerial platforms

The two following chapters will be dedicated to the presentation of some of the main platforms and online tools that you might use nowadays to support your managerial activity. We will start by presenting the platforms that covers several managerial needs and centralise them in one single application, such as Asana, or Trello.

→ Miro

Miro is an online collaborative whiteboard platform that enables diffused or remote teams to work effectively together, utilizing aspects from brainstorming with digital sticky notes to planning and managing agile workflows. It is especially useful to share ideas in a common space within a team.

Source: https://miro.com

→ Asana

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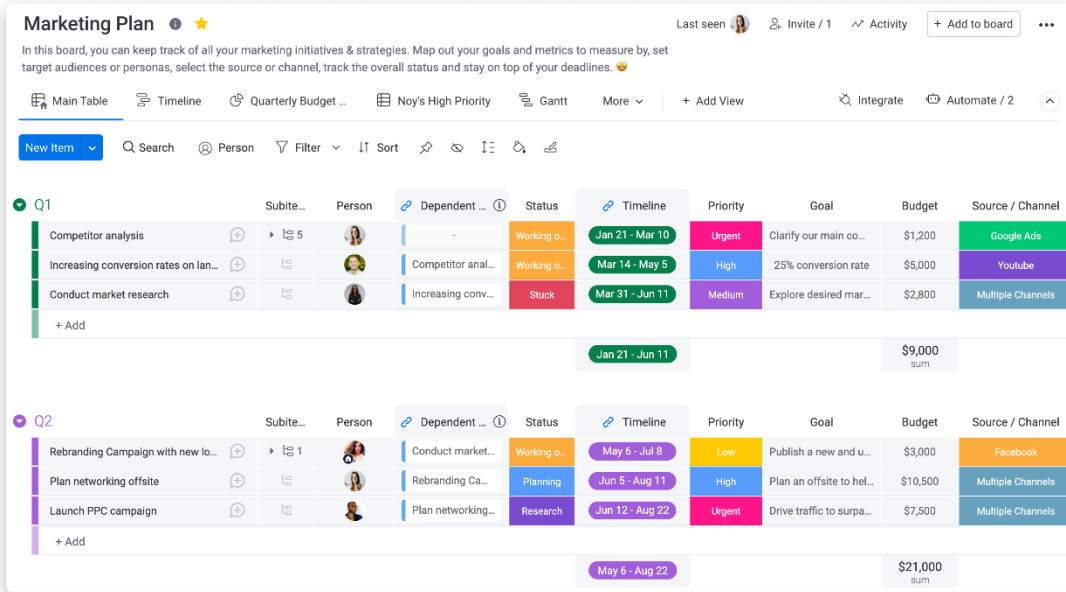Co-funded by the
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Asana is a task management and project management software for collaboration and project-specific planning. Asana takes up the foundations of project management tools with the aim of offering a structuring framework to teams and, at the same time, a flexible, visual and collaborative experience.
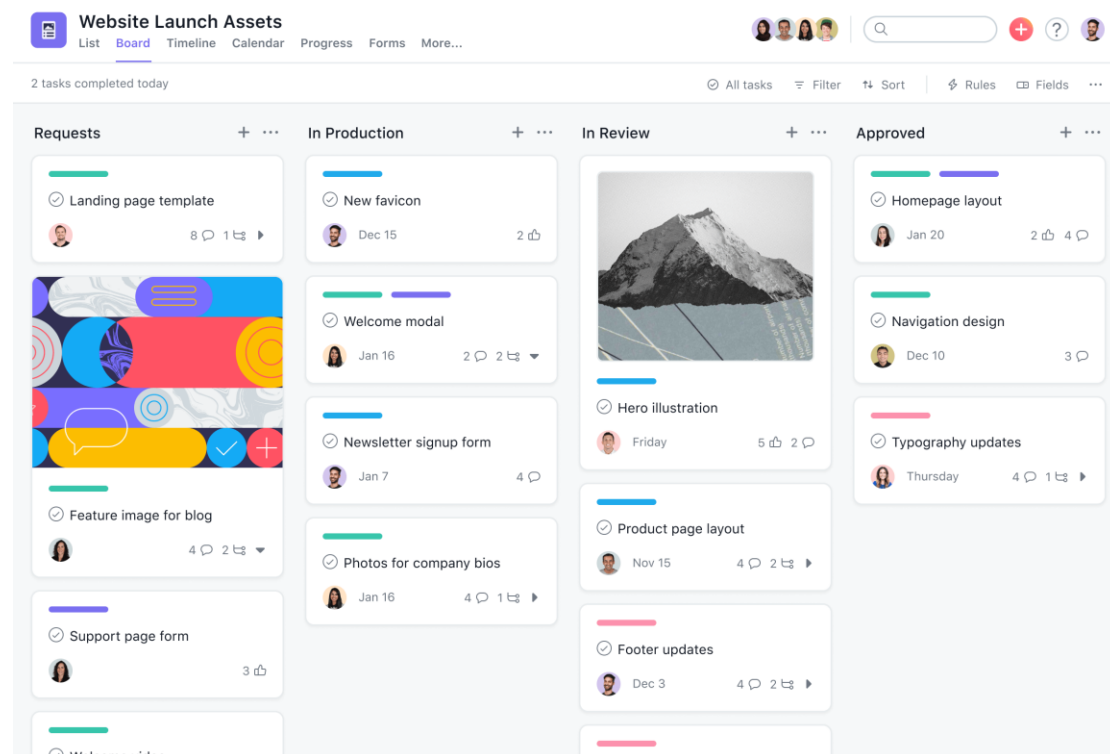
Source: www.asana.com

→ Monday

Monday is a team management and project management software to organise workflows according to your needs to increase the alignment, efficiency, and productivity of your team. It compiles areas, processes, tools, communications and files in a single operative system which connects teams.

Source: https://monday.com

→ Trello

Trello is a universal organization tool for personal and professional projects. Trello proposes a specific approach to project management: tasks are replaced by "cards" and projects by "boards". This approach is based on the Kanban management method (see our Practical activity) to improve the visibility of the workflow thanks to a highly visual environment (imitating Post-it notes on a white board). This project management tool is ideal for both planning a new complex project or organizing your wedding.

Source: https://trello.com
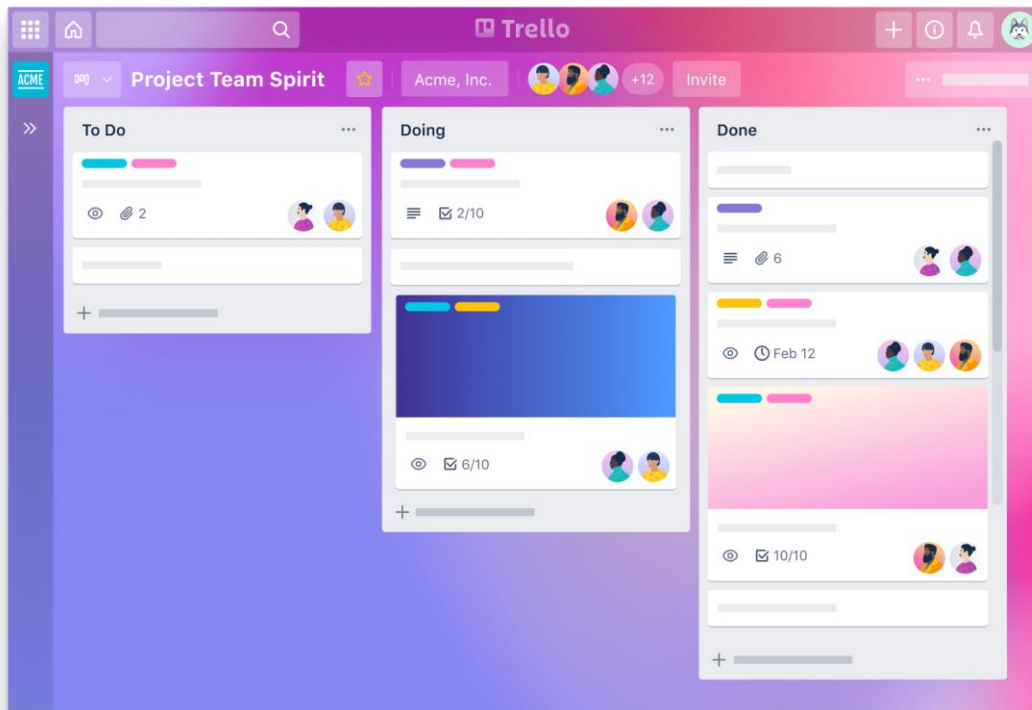
→ Other managerial platform

As stated in the introduction of this chapter, there are multiple platforms offering managerial services. Thus, you might study well the market and your managerial needs before you chose one or another. There are also platforms that are specialised in one or another type of project, for instance the AdminProject platform, which was especially designed for the management of Erasmus + funded project, or Freshservice, for the management of IT teams.

> How to choose the management platform that best fit to your needs? <

Asana, Monday and Trello are very similar with regards to the main features they offer. Also, there are much more similar applications in the market. All offer a main dashboard on which you can organise tasks, assign duties to the different members of the team, and control your timeline. None of them require training, certification,

specific project planning methodology or professional support to use. These solutions are simple and intuitive online collaboration tools and can be used anytime, anywhere. Thus, considering that the main differences here lie in small details, here are some comparison criteria that you might use to decide, in addition to the basic usability:

- Team members: number of users of the tool and possibility to create teams
- Integration: the possibility to connect with other applications (for instance with chats, Google Drive, videoconference applications, etc.),
- User interface, which refers to the visual elements, if it is easy to navigate within the tool, it is intuitive, etc.
- The customer service
- The value for the price. Most applications have free – demo versions, so you should check what the elements are included in the free version, see if you need a paid version, what services it includes, etc. Thanks to the free versions, you can test them and select the one you feel more comfortable with. Then, you might have a look at the different services that they offer in their premium version.

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Chapter 4 – Applications dedicated to specific tasks

Most of the applications mentioned above enable you to integrate others, that will provide you additional services and compile all your managerial tasks in one single entrance door application. For instance, you might connect your multitask platform account with other applications dedicated to communication, file management, finances, marketing and design, sales, security, etc.

> Communication <

→ Slack
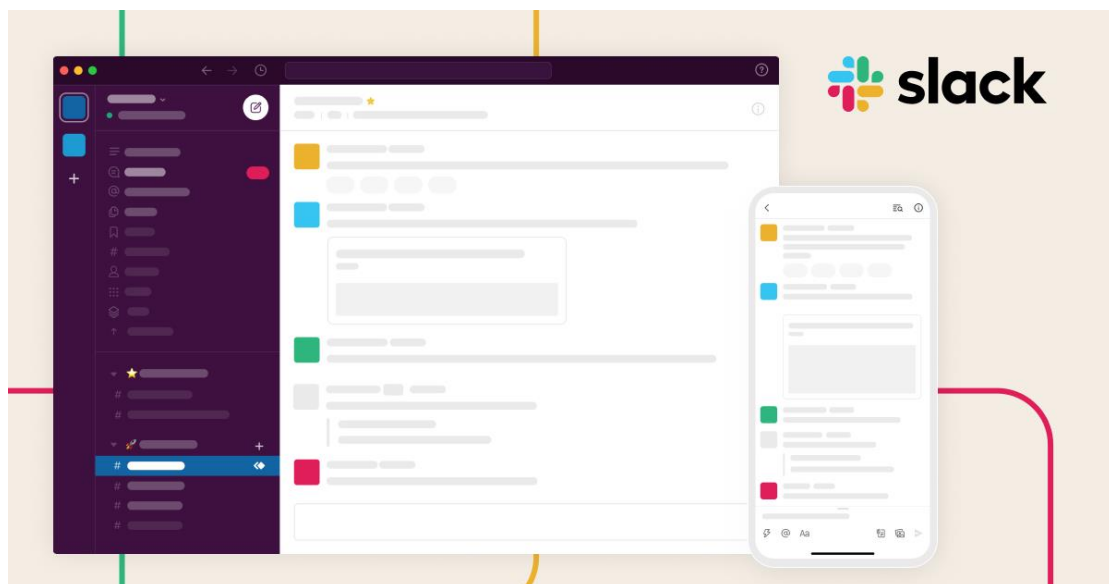
Source: www.slack.com

Slack is a messaging programme designed especially for the workplace. Very similar to a classic chat service, this programme offers you the advantage of creating teams and channels to discuss a specific topic in a place where your colleagues can find the information easily. You can also send files, share links, send voice messages, and use Zoom or other videoconference platforms, among others.

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> Files management <

File management services offer two major assets:

- As you stock your files on the cloud, it frees spaces from your computer, so it can be reserved for other things, and operates faster.
- It enables you to share the documents in an easiest way with your colleagues. You don't have to send emails with heavy attachments anymore, a link to a folder on the cloud is enough.

Then, you need to take care of the security of your files and remain aware that while using this kind of program, you should be especially cautious if you are dealing with confidential information.

→ Google DRIVE
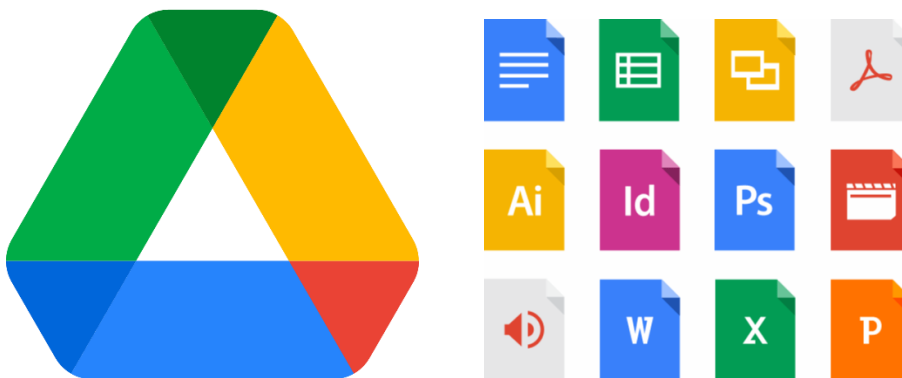
Source: www.google.com

Google drive is a service of files storage on the cloud. The user has 15 GB of free storage, and additional space for further paid plans. Drive encompasses Google Docs, Google Sheets, and Google Slides, which are parts of an online office suite that is compatible with Microsoft office document (for uploading or downloading files). Drive enables sharing and synchronisation of the files, which means that it permits collaborative editing of documents in addition to saving them on the cloud.

→ Dropbox
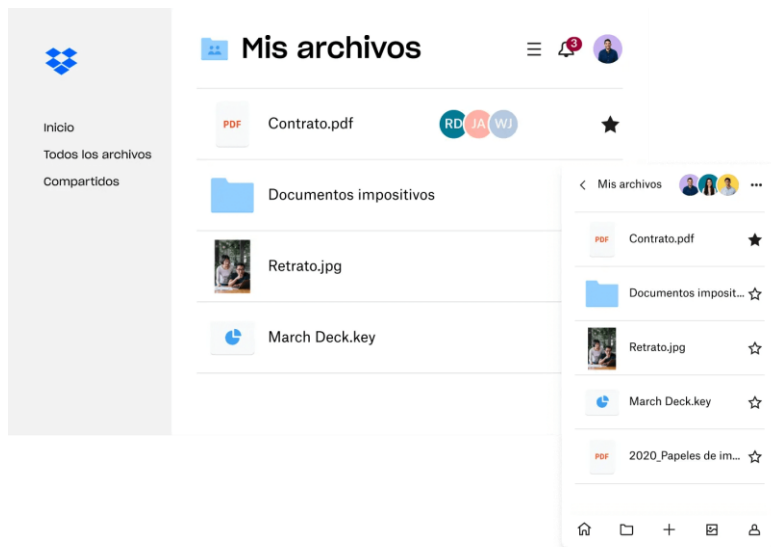
Similarly to the Google Drive, Dropbox is a service of file storage on the cloud. The free version offers 2 GB of storage along with the file sharing, storage collaboration and backup service. By using a paid version, you can get more space and share your accounts with more users.

Both Drive and Dropbox can be installed on your computer for a direct access from your desktop. Thus, you can access the files online, through DRIVE or Dropbox website by connecting to your account, or directly from your computer as any other file, from your "drive" or "Dropbox" folder. The files will be stored on the cloud, but you won't spot a difference with the file stored directly on your computer.

> Time management <

→ Google Calendar

Google Calendar is an online calendar offered as a free service among Google products. Its main advantage is the possibility to create several agendas (for instance

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one for your work, another one for your personal activities) and to connect them with other accounts (so several people working in the same team can access the agenda, add meetings that everyone will see, etc.). You can visualise your different agendas in a single place, create new events, link online meetings, synchronise your agenda with outlook, create reminders and alerts, etc.

→ Outlook

Outlook offers a very similar service while being directly connected to your office mailbox.

→ Doodle
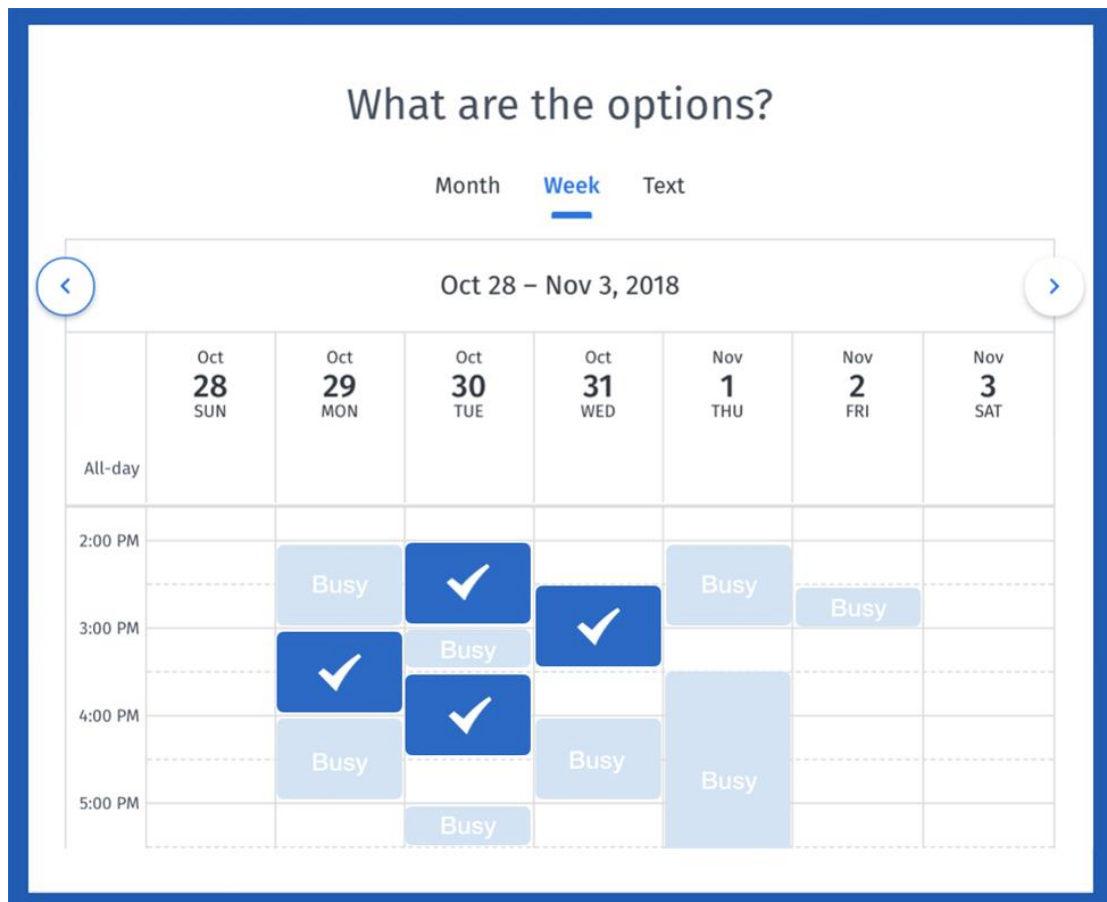
Source: www.doodle.com

Doodle is a survey tool designed specially to fix date and time. You can use it for planning a meeting as well as for choosing the date for your next weekend with your friends. You simply need to launch a survey with the subject, propose slots of time, and then send and invitation or link to the rest of participants. Each participant votes for the slot of time that better suit him/her, and then you can access the results and see in one screen what is the best choice for your meeting time.

→ RescueTime

RescueTime is a very useful a program for your computer desktop (Windows and MacOS). This program is a web-based time management and analytics tool for workers who want to be more efficient and productive. It allows avoiding distractions in your digital life. RescueTime helps you understand daily habits so you can focus and be more productive.


Source: https://www.rescuetime.com/

→ Forest

If you need something similar to be more productive at work and not be distracted by your mobile phone, we have some examples of tools that can help you achieve the

goal of staying focused on what you are doing and not being distracted by absurd notifications. Nowadays, all mobiles already include the "do not disturb" option provide options for the configuration and schedule of applications and notifications but if you want to go a step further, you have to familiarize yourself with this app for Android and iOS: Forest.

This application converts the dishabituation from the mobile phone into the creation of a virtual forest, so that our inactivity translates into its growth and conservation. In this way, if you need to concentrate for 40 minutes, you can choose that period of time in Forest, your tree is planted and for no reason should you leave the application, because the moment you do, your little tree will die without mercy. Of course, the app allows you to lock your phone so you don't get distracted watching your plant grow.

Source: https://www.forestapp.cc/
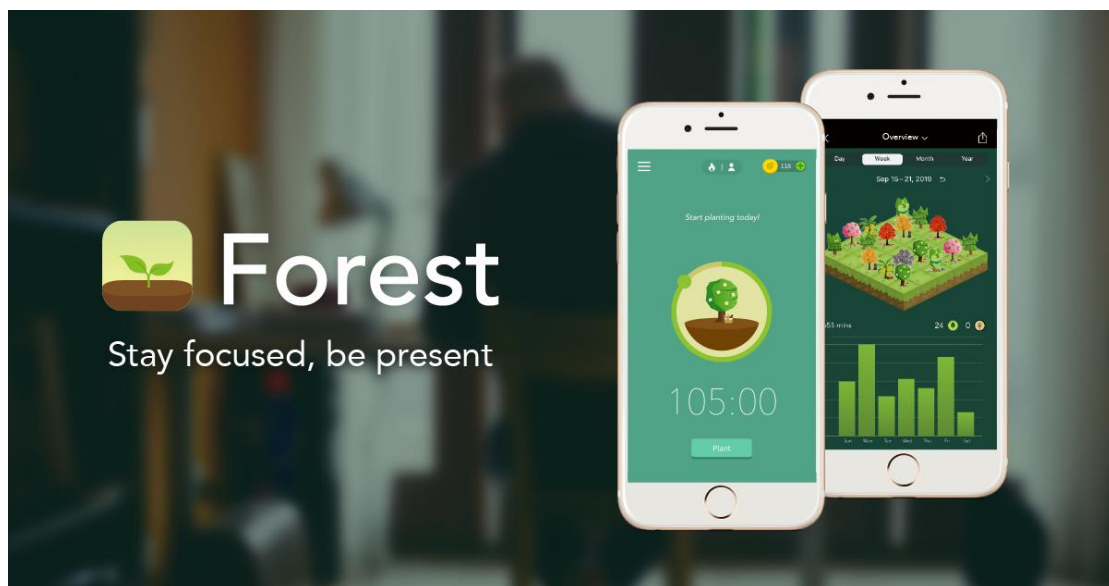
As you let your trees grow, the app gives you virtual coins, which you can redeem by buying other species to plant in your forest. But if you prefer to save the coins, the app has a space where users can buy a real tree that will be planted in a real forest.

Forest also has extensions for browsers such as Google Chrome or Firefox and you can also synchronise the activity with your iPhone. All you have to do is create a user

profile in the Forest app on your mobile phone and when you download the extension in Chrome or Firefox, go to settings and enter your credentials.

The interesting thing about using Forest on your computer is that you can inform it of which sites take away your productivity so that the moment you plant your tree and try to access those sites, the app will remind you that you can kill your little bush if you do so.

> Evaluation <

→ Google form or Survey Monkey

Source: www.surveymonkey.com

These tools enable you to create surveys and collect answers, with supporting tools to visualise and analyse the answer. Both offer the possibility to create different types of questions (single or multiple answers, text, yes/no, matrix, etc), mandatory or not. Then, you can share a link to the survey to all participants and collect their feedbacks in an easy way.

> Design <

→ Canva

Source: www.canva.com

This online tool helps you to create all kind of design for your communication. It offers free and premium templates for posters, flyers, Instagram posts, infographics, invitations, curriculum, etc, as well as number of icons, pictures and illustrations of all kinds.

Chapter 5 – Practical Activity/Worksheet & Useful Tools

Practical activity

In this section we present to you some practices that you can carry out, based on the Kanban method, which will help you in the automatization of routines, Despite the fact that it will mainly assist you with managing, it will also have positive repercussions in your self-management as you will reduce stress by having all your tasks organised and scheduled, increase your motivation by having a clear overview of the milestones to achieve and being able to check your progress, and as we said at the beginning, you will learn to manage your work-flow efficiently.
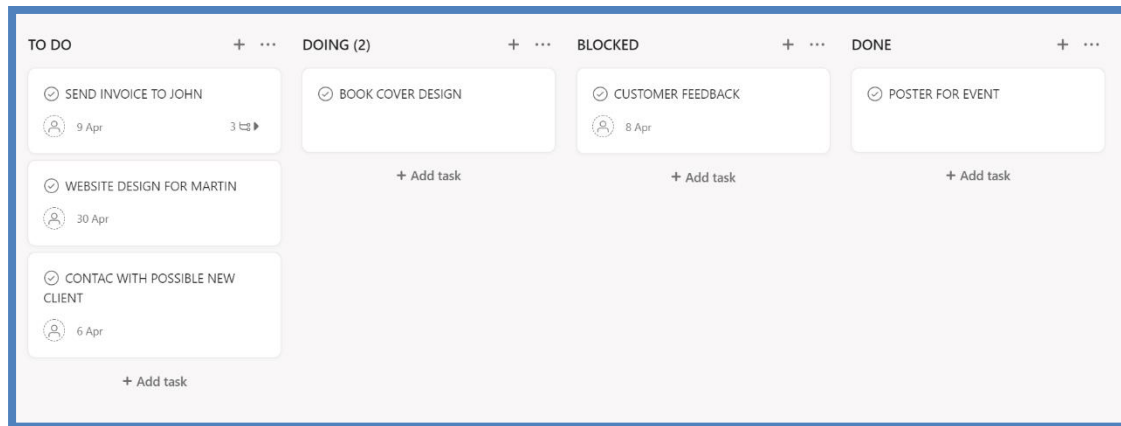
> Visualise the workflow <

Choose one of the online dashboards presented in the previous chapters, which helps you to see the status of your tasks at a glance.

In the columns, you will put the steps that a task must go through to be considered complete. These can be very generic steps such as: TO DO-DOING-DONE. You can also add a "BLOCK" column for those tasks that cannot continue because they depend on other contingencies which are out of your hands (for example, if you are waiting for a collaborator contribution and you cannot continue working on your project until this part of the third person is done).

In the rows, you will put each of the tasks you have to complete (in the form of cards).

In addition, if you work in a team, the task board will allow you to know the status of each of the tasks assigned to each team member, without having to ask them continuously about the task status. Thus, you will be able to monitor how the teamwork is progressing in a very easy way.

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TO DO	+ ⋯	DOING (2)	+ ⋯	BLOCKED	+ ⋯	DONE	+ ⋯

TO DO	DOING (2)	BLOCKED	DONE
⊘ SEND INVOICE TO JOHN	⊘ BOOK COVER DESIGN	⊘ CUSTOMER FEEDBACK	⊘ POSTER FOR EVENT
⊗ 9 Apr 3 ▷		⊗ 8 Apr	
	+ Add task	+ Add task	+ Add task
⊘ WEBSITE DESIGN FOR MARTIN			
⊗ 30 Apr			
⊘ CONTAC WITH POSSIBLE NEW CLIENT			
⊗ 6 Apr			
+ Add task			

Source - Screenshot of a dashboard in the tool Asana (www.asana.com)

> Describe the task <

It is important that you describe very well the tasks to be done: who is responsible for the task, when the delivery date is foreseen, what priority it has and what steps or subtasks have to be carried out to consider the entire task finished, planning it from the beginning will allow you to work more efficiently. Also, before starting to perform tasks, order them in the "TO DO" column according to the priority you give to each one of them.
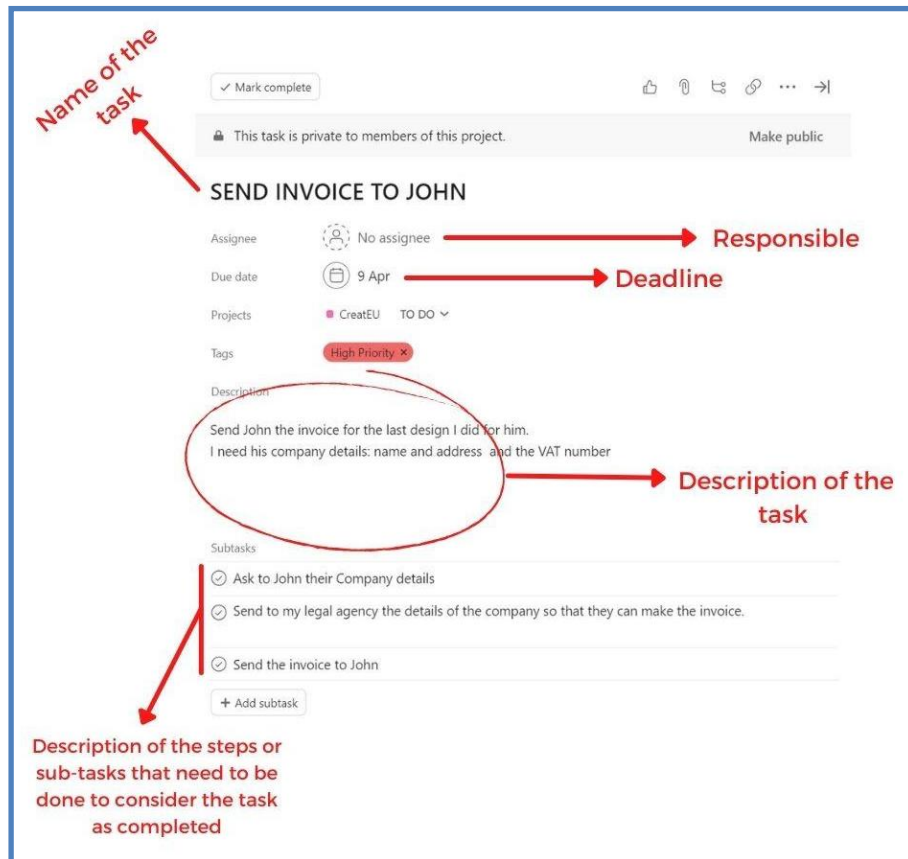
Source: Screenshot of the description of a task in Asana

> Stop starting, start finishing <

In the DOING column, (see dashboard screenshot), there is a (2), which means that there cannot be more than two tasks in that work column, so if you want to start a new task, you will have to finish one of the tasks you have already started. This is called "work in progress limit" and helps you to "stop starting, start finishing". Thus, it always prioritizes a job that is in progress before starting a new one. This will allow you to finish tasks that you have started a long time ago, and not accumulate pending work. You can set the limit yourself as you see fit.

Useful tools:

Adminproject: https://ap.adminproject.eu/

Asana: https://asana.com/

Canva: https://www.canva.com/

Doodle: https://doodle.com/dashboard

Dropbox: https://www.dropbox.com/

Google Drive: https://drive.google.com/

Microsoft Project: https://www.microsoft.com/es-es/microsoft-365/project/project-management-software

Miro: https://miro.com/app/dashboard/

Monday : https://www.monday.com/

Nifty: https://niftypm.com/

Planner: https://tasks.office.com/

Slack: https://slack.com/

SurveyMonkey: https://www.surveymonkey.com/

Trello: https://trello.com/en

Forest: https://www.forestapp.cc/

RescueTime: https://www.rescuetime.com/

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