PROJECT MANAGEMENT PROCESS MAPPER

INTRODUCTION

Many firms want to improve their project management processes to provide better work product, improve efficiency, and maximize profitability. Unfortunately, many of those same firms struggle to make improvement because they lack visibility into their current process and a clear picture of where they are trying to go. Many firms also try to change too many things at once, leading to a lack of consistency, accountability, and adoption.

Factor A/E is an online app for architecture and engineering firms that connects people, projects, and invoicing. The features in the app help your team get the visibility and consistency it needs to be successful.

One of the tools we use during onboarding is the **Project Management Process Mapper** to evaluate where firms are currently at in their project management practices and to create a roadmap for where they want to go.

You don't need Factor A/E to get your team on the same page!
By following the steps on the next page and using the Project Management Process Mapper on the next few pages, you can paint a clear picture of where you are and where you want to go.

Want to learn more about Factor A/E? Sign up for a free trial account or request a demo at **factorapp.com**

Read more information about project management best practices **on our blog.**

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Instructions

Activity List:

1. Make a list of one-time activities that are required to "set up" a project, such as: enter budget, add rates, assign team members, etc.

2. Next, list the activities that go into initial plans for a project, such as setting timelines for phases, creating billing milestones, or assigning hours to team members.

3. Next, consider the reporting activities your team uses to evaluate activity on projects and compare it to planned budget or timeline. Think about the recurring meetings or communication events when team members communicate project status to one another. Include any update, revision, or adjustment tasks that are performed in response to data collected as the project progresses.

4. Finally, consider all the input and activity required to get invoices out to your clients. Who communicates project status? Who drafts invoices? Who reaches out when clients are slow to pay?

5. For item on your activity list, note the responsible party (who does the action) and how often (once per project, weekly, etc.)

Workflow:
Arrange the items in your lists into the chart on the following page, organizing them into the correct phase of your project lifecycle.

If you need additional lines boxes, feel free to copy the pages as needed.
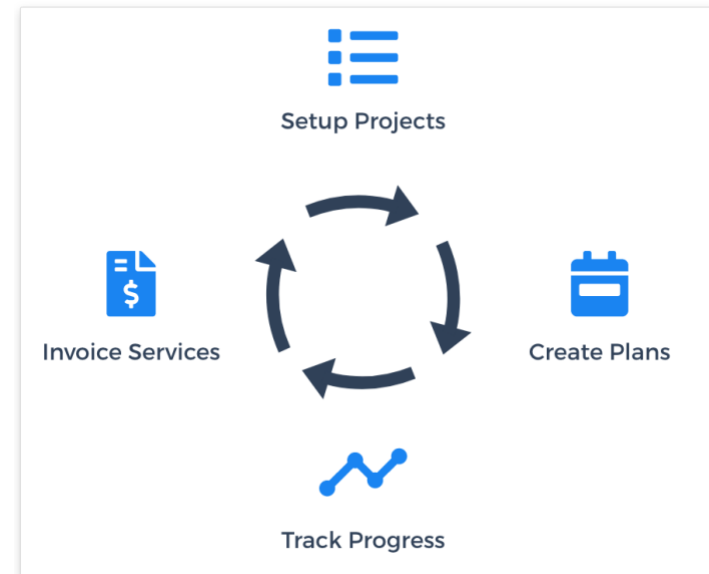
Most projects follow a similar lifecycle to the one shown above. Where things get inconsistent is in the details. Many firms experience dissonance due to separation between roles that perform budgeting or accounting activities and those that manage the work. This creates unnecessary communication loops where time is quickly overspent. Other firms simply lack enforced standards, which leads to team members performing roles in very different ways, leading to difficulty in understanding health of projects and the firm overall.

Factor A/E brings all phases of this lifecycle together, making consistency and efficiency attainable and simple for your firm.

ACTIVITY LIST	RESPONSIBLE PARTY	Phase
List all activities related to project setup, tracking, reporting, updating, and communication	*List the responsible party for each activity*	*List how frequently the activity occurs*
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		

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Setup Projects	What:	What:	What:	What:	What:
	Who:	Who:	Who:	Who:	Who:
	When:	When:	When:	When:	When:

Create Plans	What:	What:	What:	What:	What:
	Who:	Who:	Who:	Who:	Who:
	When:	When:	When:	When:	When:

Track Progress	What:	What:	What:	What:	What:
	Who:	Who:	Who:	Who:	Who:
	When:	When:	When:	When:	When:

Invoice Services	What:	What:	What:	What:	What:
	Who:	Who:	Who:	Who:	Who:
	When:	When:	When:	When:	When:

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