

How to use Waterfall project management to improve your efficiency

Project management isn't just a skill for project managers, more and more positions are expected to implement these practices day to day. However, there are many styles of project management to choose from, depending on the needs of the specific project. One common style is Waterfall project management.

Waterfall project management involves a clearly laid out process that is followed from start to finish. In this style, each task is finished completely before the next task begins. While less flexible than some methods, Waterfall project management works great for projects with multiple steps but fewer variables.

For example, think of a production line — one part needs to be completed before it can be attached to the next one. This method doesn't only apply to a production line, however. Many tasks and processes follow a similar path and by applying these methods, you can easily get an unwieldy project under control.

Project kick-off

Let's say that you're responsible for ensuring the annual budget update process goes smoothly and that each department updates its numbers and submits the right forms in time.

First, you'll want to have a project kick-off. Here you need to identify some key information like all the stakeholders involved, any specific deadlines that must be met, and the necessary steps that must be completed. Your kick-off should be thorough; after all, you want to craft a plan that you can adhere to from conception to completion.

Outline each phase

Now, you should outline each phase. In this example, most initial tasks must be completed before the next one can happen. So let's think about what that might look like.

1. Update last year's forms.
2. Draft budget update process guidelines.
3. Send an email to each department head with the form and process guidelines.
4. Leads fill out and submit forms.
5. Review submitted forms for accuracy.
6. Work with department leads to correct any errors, if applicable.
7. Submit completed forms to supervisor for review. - Due 5/18

You may wish to track more specific details under each main bullet. That's fine, as long as each task can only be done after the preceding task is complete. For example, bullet 2 may look like this:

- Update last year's forms.
 - Update dates and titles on existing forms.
 - Have supervisor review.

- Make any changes.
- Get sign-off from the finance department.

In this case, each sub-task needs to be done in order before the overarching task can be checked off. While you don't want to be *too* granular, documenting every single tiny aspect, you should be as detailed as is useful for you. This is your working document, so it should include a level of detail that will help you and those you're working with keep track of the project's progress.

Assign deadlines

There are two ways of approaching this. You can either work backward or forward.

To work backward, you have your end date in mind. In this example, it's 5/18. Let's say today is 4/18, leaving you 30 days to complete the task. You now know what time you have to work with and can start filling in the dates for each task along the way. So we'll assume you want to leave at least a week to review the submitted forms and work with department leads to correct errors. That means department leads need to have their forms submitted by 5/11. Assuming you want to give them 2 weeks to fill everything out, that means you need to send the forms to them in late April. This process lets you determine how much time is available for each step to ensure you meet the target date. Generally, it's advisable to leave some buffer time — if 5/18 is the due date, aim to have everything finished a few days before in case something takes longer than expected.

To work forward, you'll have to do a bit more estimation. If you don't have a specific or particularly tight due date, then you can look at each task and estimate the time it will take to complete it. This way, you'll eventually end up with a completion date for the project.

In some cases, you may need to do a bit of both. If, after working backward, you realize you should have started 2 weeks ago, then you'll need to look forward a bit and identify where there's room to shorten the time allotted to some tasks. Alternatively, if you feel the timeline isn't attainable, then this detailed outline will be a great resource to take to your supervisor to discuss extending the deadline.

Track the project

Generally, it's advisable to keep a document where you track the project progress. You could choose to use a more sophisticated project management program like Asana. Or you could build out an Excel sheet, or even a word document. Generally, you want to include each task, its due date, a progress update (not started, in progress, complete), and room for any comments.

Additionally, it's best for your project tracker to exist in a shared space somewhere. This allows others to check on the status of the project without needing to go to you directly. It's possible that deadlines may change or new tasks may come up. That's okay, but be sure to update your project plan and dates to reflect that. Generally, Waterfall project management isn't ideal for projects with many variables, but a few small changes here and there shouldn't derail a whole project.

Review the project plan afterward

As with any task, you'll want to review how the project went afterward. Did you stick to the plan? Did you have to make many changes? What went well? What went poorly? Ask yourself, and others involved, questions to get a feel for what worked well and what didn't.

If this project is something that recurs every year, then you want to make notes so that the process can be improved next year. Even if it isn't, you still may find valuable insights that you can use to improve upon other future projects.

Additional resource: [How to apply Agile project management principles to your work.](#)