Association for Project Management

Project Management in Newsrooms

Robin Kwong

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Acknowledgements

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About the author

Robin Kwong has two decades of journalism experience working in a variety of roles in newsrooms across Asia, Europe and North America. He has been a reporter, editor, special projects editor, and a senior leader and manager in the newsrooms of the *Financial Times* and *The Wall Street Journal*.

He has won multiple awards for projects including The Uber Game and The WSJ Email Challenge. He graduated from Yale University and is an honorary fellow of the Association for Project Management.

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We know that better project delivery is about achieving your desired outcome. We believe that's about more than process alone. When doing so will make a difference, we challenge the status quo and champion the new. So, in a complex and shifting world, we help the project profession deliver better, because when projects succeed, society benefits.

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Contents

Chapter 1:

Introduction

If you are reading this guide, chances are good that you have worked on something in your newsroom that went beyond the normal course of reporting, writing, filming, editing, producing, etc. Maybe it was a series of multimedia stories, or an interactive news app, or a 'pop-up' newsroom to engage more deeply with your community. It'll likely have been a group effort, and involved people from different teams, or even departments outside of the newsroom.

You might've been excited by the opportunity to do something innovative and out of the ordinary, and energised by collaborating with people with different skills from your own. You may have marvelled at how smoothly it all went, even though no one had done this before and everyone had other responsibilities they were juggling. When the project ended, everyone felt like they had learnt something valuable for the next time.

Or, it might've been a complete shambles. No one was sure who was in charge and how decisions would be made. What started off as a solid concept morphed into something incoherent as everyone chipped in with their pet ideas. You were never clear how your work fitted into what everyone else was doing, and even though you got the project past the finish line, by the end everyone swore privately to never get involved in something like this again.

Whether you experienced the former or the latter comes directly down to project management. Good project management is hard to find in newsrooms, which traditionally didn't hire professional project managers. Instead, they expected editors, audience engagement teams or other digital staff to take on project management responsibilities without providing them with the necessary training, even though the core skills in their job can be quite different from project management skills. Moreover, while larger newsrooms may have a product or technology department with well-established project management systems, the traditional divide between the editorial and business sides means these might be completely foreign to newsroom staff.

I first practised project management (without realising at the time that was what I was doing) when I coordinated several multi-day reporting series as Technology Editor at the *Financial Times*. I fully realised the power of project management when I started building interactive news experience as part of a multi-disciplinary team.

The need for better project management in newsrooms is getting stronger. As newsrooms adapt to a changing digital landscape, they are forced to try new things. This means more experiments, more work that falls outside of 'business-as-usual', and more one-off efforts – in other words, more projects. The other reason is that newsroom roles are diversifying. A generation ago, editors and reporters accounted for the vast majority of staff in a newsroom. Now we have newsroom developers, data scientists, social media producers, audience engagement specialists, interactive designers and more. As we add new disciplines and new silos to the news operation, planning, coordination, trouble-shooting, stakeholder engagement and communication – i.e. core project management skills – become the difference between success and failure.

Who is this for?

This guide aims to help anyone interested in practising project management in a newsroom environment to become better at it.

You are probably not already doing this as your full-time job. You may not have managed a project before and if you are an early-career journalist, you may even feel like you do not have the authority to take charge of a project. Fortunately, because there usually aren't formal project management jobs in newsrooms, often the main prerequisite for managing a project that you're involved in is simply stating your desire to do so.

To become a good project manager, however, you will need organisation and communication skills. It'll also help to have a strong knowledge of the newsroom you work at: its culture, its key people and its organisational structure.

This guide will walk you through the entire project process, from seeking approval to launch a project all the way to sunsetting (or closing down) existing projects.

Chapter 2

covers project planning – essentially, all the work that needs to happen before 'the work' starts.

Chapter 3

helps you deal with the unexpected during project execution.

Finally,

Chapter 4

guides you through wrapping up the project in a way that leaves everyone with a sense of closure.

The processes described in this guide will help improve your planning, communication, organisation and stakeholder management skills. It'll give you practical tips on what to do if someone says no to the project and how to handle unexpected developments. It should also help by giving you a framework to think holistically about a project so that you can be intentional and proactive in seeing it through.

What types of projects this guide covers

The Association for Project Management – the chartered membership organisation for project professionals– defines a project as:

Project:

A unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget. Time, cost and quality are the building blocks of every project.

This is very broad, and can potentially cover everything from publishing a series of articles to overhauling the newsroom's content management system.

For the purposes of this guide, we will focus primarily on projects with an editorial output. These projects could be cross-functional and involve colleagues from other departments, but will generally result in one or more published pieces, and generally involve reporters and editors practising journalism as the main component. It excludes purely internal projects (like overhauling the publishing system), or external projects that are not editorial in nature (for example, running a marketing campaign).

This guide assumes that the project is collaborative. While there are certainly solo projects that would benefit from following the principles outlined in this guide, large portions of the guide are devoted to communication and the work of corralling other people.

Project vs product management

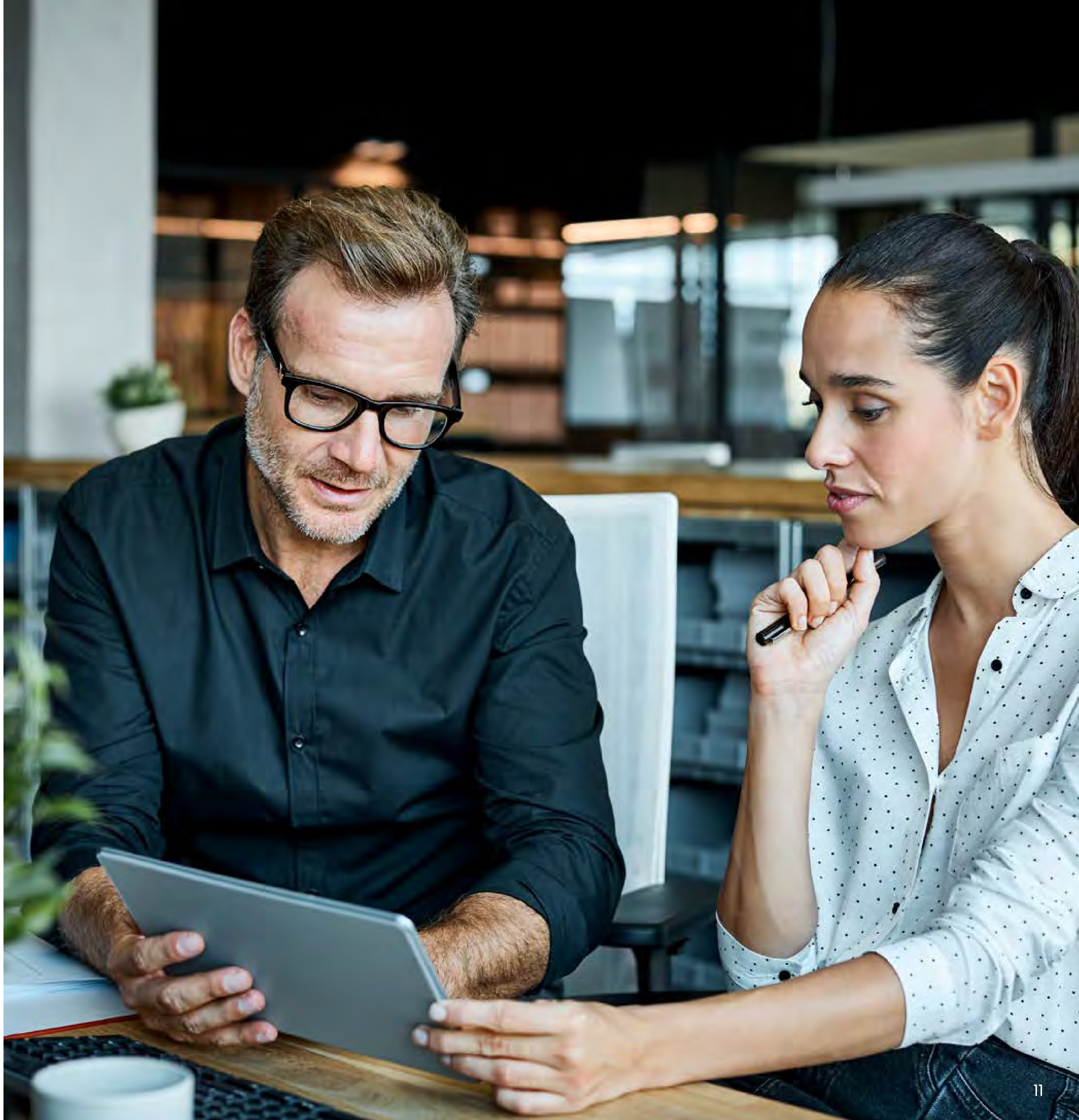
People often confuse project and product management. The recent rise of product thinking and product jobs and departments in journalism means that those two roles increasingly co-exist within news organisations, adding to the confusion.

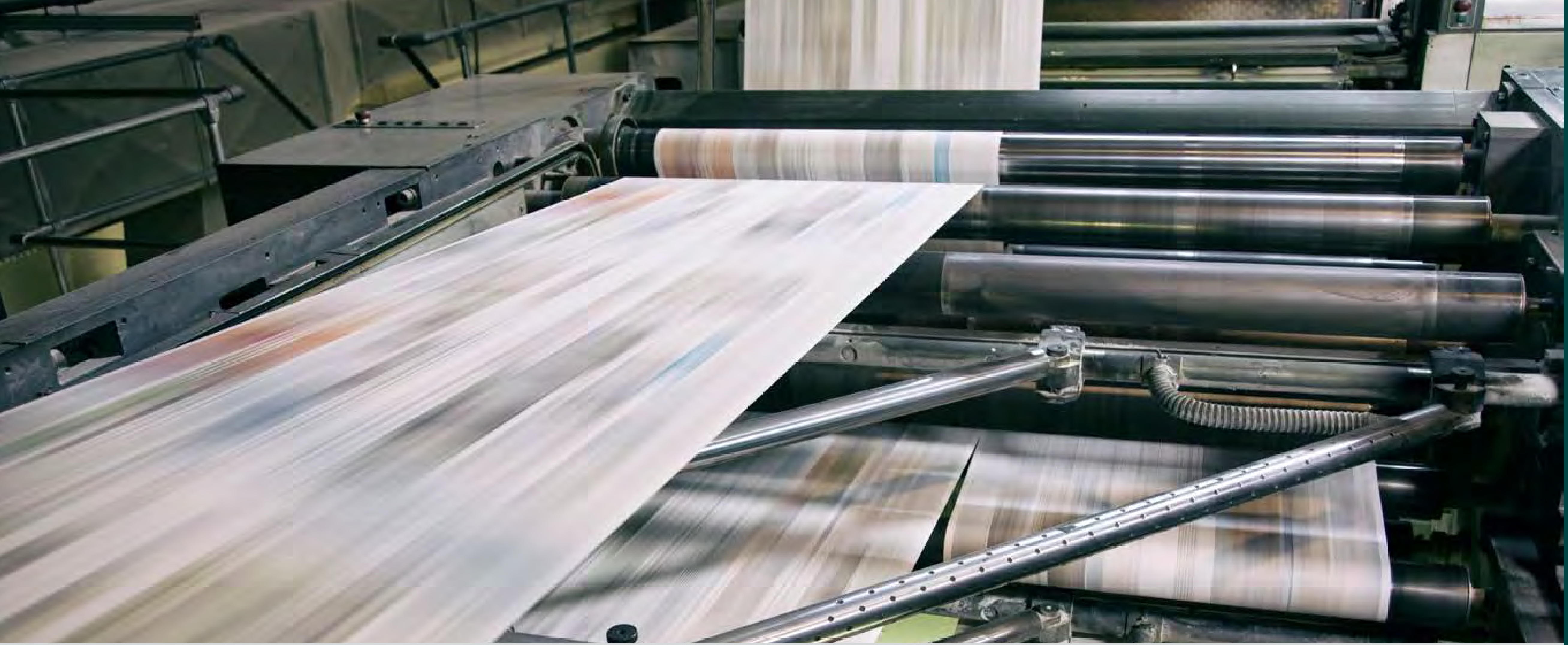
Product managers oversee a product (any service or item created to serve a customer need) through its life cycle: conception, planning, developing, launching, maintaining, evolving, sunsetting. Their goal is to maximise the value of the product to the organisation throughout its life cycle. Successful products never have to die so, unlike a project, they are not transient.

This creates differences between the work of project vs product managers. Project managers, for example, will usually have to convene people from several different functional areas for each of their projects. Projects typically run for a shorter period of time than products, and a project manager will more quickly arrive at a clear definition of the project's scope, objectives and end-point. Project success is achieved by meeting those objectives, which will likely include elements of customer needs, but also other factors such as delivery to time, cost and quality.

Product management operates by recognising and solving a problem faced by a defined audience. Product managers, therefore, will often assemble a dedicated product team to work together on a product over a longer period of time. They will spend more time in product discovery to understand the audience problem before defining the product's initial scope. The product's scope and objectives will also change over time as the product team iterates on new versions and learns more about the audience problem through doing so. All of this takes place over a longer period of time than the typical project, so product managers will worry about maintaining the pace and velocity of their teams as the product evolves.

The traditional wall separating newsrooms from the rest of the business also means that product managers who sit on the business side are beholden to business goals that are separate from and different to the newsroom goals that editorial project managers operate under.





What makes a newsroom different?

Managing projects within a newsroom environment presents its own unique challenges:

- The pace of news means that most projects are relatively short term (compared with, for example, multi-year construction projects to build a new road or hospital).
- Newsroom resources are often stretched, so there may not be any dedicated budget (or even a process to request a budget) for an editorial project.
- Most people you work with on the project will likely have a full workload of other daily tasks that take precedence over the project.
- The nature of news means that your project's scope, timescale or even viability could change drastically depending on real-world events.
- The traditional divide between editorial and business units – intended to preserve editorial independence – presents unique stakeholder management challenges. The newsroom being siloed away means that there usually isn't a single senior-enough stakeholder that the editorial project manager could rely on to fully sponsor a project and secure buy-in and resources across departments. It therefore often falls to project managers to 'bridge' multiple teams – sometimes even purely within the newsroom – and secure their buy-in individually.

This guide takes all of this into account and will coach you on how to adapt and react to these scenarios.

A note on tools

There is an endless sea of project management and communication tools available commercially. Some of them can be incredibly helpful, but this guide assumes that your newsroom does not already have access to dedicated, paid-for project management tools. If you follow this guide, the main tools you'll need are the ones that should already be readily available in your day-to-day work: email, shared documents, slide presentations, Post-it notes.

You may wish to explore more dedicated tools as you become more experienced as a project manager, but remember: the most powerful tools are the ones that are most accessible and familiar to everyone else that you're working with.

Making a career out of newsroom project management

If you are interested in this type of work, the good news is that project management roles are becoming increasingly common in newsrooms. Some places are explicitly hiring for project managers in newsrooms, particularly in multimedia, visual storytelling, interactive news and event teams.

There are also project management roles in product departments. These are often called delivery or programme managers and they often work hand in hand with product managers.

Finally, you may be able to carve out a 'bridge role' for yourself in your newsroom. These can carry a variety of different job titles, from operations editor to growth editor and even more creative names.

Chapter 2:

Project planning

The idea of being able to plan in advance for a project can seem like a luxury to most journalists. Often they find themselves brought in when plans are already in motion, when senior editors already have firm (but uncommunicated and conflicting) ideas about what they want, and when they are already busy with other work.

No guide on its own is going to solve broader managerial and structural issues that devalue and prevent planning – that is going to take leadership and persistent effort in changing the organisational culture. But a little planning goes a long way, and delivering successful projects is a powerful way to start advocating for change. That's where this guide comes in.

This chapter will walk you through the steps from the inception of a project through to just before the official kick-off meeting that signals the start of hands-on project work: reporting, filming, designing, coding, etc. It will help you clarify your project's core idea (the 'What' and the 'Why'), how you'll measure success, your team composition and stakeholders (the 'Who'), as well as a list of tasks and timings for their completion (the 'When').

Chapter 3 covers project execution, from how to convene the kick-off meeting to how to structure ongoing communications as the project progresses. It will also address change control , i.e. how to handle unexpected situations and new information.

This may make the process seem quite linear. In reality, you may need to go back and forth between planning, discussing, researching and negotiating, and draw on tactics from both chapters, in order to fully flesh out your project plan.

If you are new to project work, or have the stereotypical journalist's faith in 'winging it' (i.e. staying flexible and reacting quickly to any situation instead of committing too early), the steps outlined here can seem like *a lot*. There are several reasons for this. Most of these steps tackle a different type of work from what journalists are normally asked to do: successful project management hinges on communication and creating coordinated action. It is also usually work that exists outside of the normal workflow of a newsroom and can be unfamiliar to people participating in the project, even if they are veterans of their own disciplines.

Good planning, even if it's more work initially, is a force multiplier. This chapter aims to help you anticipate and head off bigger problems down the road. By forcing you to think in detail about the project in advance, the act of planning also keeps your mind open to other possibilities such as more ambitious formats or experiments.

Treat Chapter 2 as a series of prompts for issues you should think through in the early stages of a project. They are listed in decreasing order of importance and clarity needed; i.e. by the time you progress to Chapter 3, you should be crystal clear on the project's core idea, but you may only have a general outline of the to-do and the timeline.

Broadly speaking, Chapter 2 covers areas of planning that you can make significant progress on either through doing some research, sitting down and thinking things through in your own head, or through one-on-one conversations. Chapter 3, in contrast, will be all about fostering collaboration and managing group dynamics.

Note that this guide tries to anticipate the issues that might need to be addressed for projects of all different shapes and sizes. It will not work if you treat it as a cookie-cutter solution and apply every step outlined here to the letter. Instead, you should feel free to pick and use the sections that are most applicable to the project you are working on. The final section of this chapter – 'Quick and dirty planning for breaking news situations' – also offers guidance on how to do 'just enough' planning in breaking news situations.

WSJ Money Challenge

Throughout this chapter, I am going to use as an example a project I helped manage at *The Wall Street Journal*. The WSJ's Six-Week Money Challenge is an automated email course. Readers could sign up at any time (even now!) and start doing the course, which is delivered weekly by email. The project was innovative (it was the first time the WSJ had launched an email course) and involved teams from across the newsroom, product and technology, design, marketing, and commercial. It won the Online News Association's 2021 Excellence in Newsletters, Portfolio award.

Where do projects come from?

Anywhere, really. It is often difficult, and usually unnecessary, to try to pinpoint exactly when or how something becomes a project. The important thing is that all successful projects are driven by a core idea. This core idea is the basic definition of the project, in that if the core idea changes, then it is no longer the same project. The core idea can be sparked by different things:

- An upcoming event (“We want to make sure we cover the US midterm elections well”).
- New technology (“We want to do something with machine learning”).
- New format/platform/channel (“We want to do something on TikTok”).
- A story idea (“We want to find a unique way to tell the story of supply chain disruptions”).
- Our audience (“We noticed this common request for help with understanding ballot propositions from our audience feedback”).

It is critical to uncover, articulate and communicate this core idea as early as possible because it is the project’s bedrock. The core idea should be defined in terms of what the aim is and what will be delivered as a tangible solution. By defining this and referring back to it often, the core idea will make subsequent decisions a lot easier.

Uncovering the core idea is easy if you are the person who came up with it and is initiating the project. Otherwise, you will need to find and ask the person who is the strongest advocate for the project at this stage. This may not always be the most senior person involved (a later section will cover dealing with stakeholders/senior editors/leadership), but rather, the strongest advocate is the person who most wants to see this project come to fruition.

It is OK if several people fit the bill. You should talk to all of them to see whether their core ideas are, in fact, similar, or whether you are dealing with several different project ideas. If they are different, you will need to either choose one to proceed with, or see if they can be combined. This is easier if their ideas belong in different categories. – i.e. you can potentially combine a new format idea with an upcoming event (“We want to cover the US midterm elections really well on TikTok”).

If you have experience as a reporter, use your interview skills for these conversations. The advocate may not have fully clarified in their own minds what gets them really excited about this project, and you may therefore need to dig deeper than their initial answer.

The core idea for the WSJ Money Challenge came from the personal finance bureau chief, who wanted to experiment with a new format, to make its coverage accessible and useful to readers. It was also broadly tied to an event: it was the beginning of the 2020 lockdowns and there was a moment when people were anxious about their personal finances and seemed to be seeking out projects to occupy themselves during the pandemic.

In the case of the WSJ Money Challenge, we wrote down “A limited-duration email course available for free online, to help readers improve their personal finance management skills. The course should be fun and give readers a satisfying sense of completion.”

Articulating the core idea generally means just writing it down in as clear and concise a way as possible. If we take the 5Ws (Who, What, When, Where, Why), this is the ‘What’ and the ‘Why’. You can also try writing it as if you are describing the project to a friend.

Communicating the core idea at this very early stage means getting your stakeholders ‘on side’, a stakeholder being anyone who is directly or indirectly affected by the project. In particular, editors or managers who are offering resources or whose teams will be affected by the project delivery are stakeholders.

If you have to uncover the core idea from someone else, sharing your written version with them is important to confirm that you have successfully captured what they think is the most important or exciting part of the project. If you initiated the project yourself, telling a few allies (whether or not they will eventually be involved in the project), or someone who has worked on a similar past project, is a good way to road-test the project idea. Ask them questions like:

- Does this idea make sense?
- Would you be excited about this project? Why or why not?
- What do I need to watch out for?

In addition, a good way of helping define the project is to ask yourself:

- What will it deliver?
- How will we know it has been delivered?
- What will we be able to do that we can’t do now?

Either way, this is the start of getting buy-in for the project.

Buy-in/getting to the starting line

Just because there is a clear project idea doesn't mean that you can get started immediately. This guide mostly deals with collaborative projects in large news organisations because they represent the biggest challenge in (and therefore have the most need for) project management. But even if you are working on a solo project in a small newsroom, it helps to be able to get buy-in from your bosses, colleagues and other key stakeholders.

With the WSJ Money Challenge, besides the personal finance reporter and editor, we also needed the newsletter team because we needed their access to our email sign-up and delivery system, as well as their expertise in newsletter-writing. As the project progressed, it became clear that our illustrator/designer would need to be a key participant because we came to believe that the email course would be a lot more successful if the emails are visually appealing and well designed. But initially, in the interest of keeping the core team small and getting the project off the ground, we had decided that it would be *possible* to launch even with minimal illustrations and basic design.

The core team

There are two main groups of people you need to target when you are getting buy-in to start a project: the core team and veto-wielders.

The first is the core team, i.e. the people with the skills or resources needed to turn the core idea into reality. Without these people's active and enthusiastic participation, the project would not be possible at all.

Since you will be asking these people to take on work (usually on top of their 'day jobs') and you want their enthusiastic participation, you should always aim to keep the core team as small as possible. Coordination and communication becomes harder exponentially with each additional person involved. It's also OK to start with a really small core team, and add a key participant later on as the project takes shape.

Generally speaking, the people you need for the core team will not be people who work directly for you. You'll need to exercise your persuasion and influence skills to get them on board. It therefore helps if you have already built a good relationship with them previously. Think about what motivates and excites the person you're trying to bring on board, and draw on your own reasons for being enthusiastic about the project in the first place. You also don't necessarily have to personally convince everyone. Especially in larger projects, where you may already have one or two core team members or allies, they could help with the recruiting. It may also be helpful to understand the individual's work/career aims and goals, and if you can align the work you want them to do in the project with their personal goals, this helps with motivation.

Veto-wielders and champions

Newsrooms are often very matrixed organisations where people and teams report to multiple leaders, and decision-making is decentralised. What this means is that projects can easily be killed by a single 'no' from any number of leaders, while there are very few leaders whose sole 'yes' is enough to push through a cross-functional project despite objections.

It therefore pays to think ahead of time about where those 'no's' might come from, and how to negotiate your way past them. This guide refers to these people as the 'veto-wielders' because while they hold decision-making power that could kill the project, they will probably not work directly on the project if it goes ahead. In contrast, your core team members hold the power to kill the project *and* they will be working on it.

'Veto-wielders' may sound like a negative term, but the first step to getting past a potential veto is to understand that you're both on the same side. They often have legitimate concerns or objections, or access to additional context and information that you don't. The standards and ethics and legal teams, for example, might object to your project because they see a fundamental issue from a legal, ethical or conflict of interest perspective. Anticipating, understanding and engaging with those objections at an early stage means that they could provide help and support to address those issues.

On the other hand, the matrixed nature of newsrooms means that there are many potential champions, or sponsors, of your project beyond your direct boss. While they may not be able to push through your project or secure all the resources needed for it on their own, they could be invaluable allies in helping you negotiate with other leaders who might veto your project.

You want your champions to fall in love with your project and be enthusiastic advocates for it. Sell them on your vision for the project and what's exciting about it – it could be the large potential audience benefits, or the importance of the underlying journalism, or maybe the project does something innovative.

In contrast, there may be some veto-wielders who will never be deeply enthused by your project. That does not mean that there's nothing you can do about it. To borrow a management principle popularised by Amazon founder Jeff Bezos, all you need is for them to "disagree and commit", i.e. to not actively oppose the project and exercise their veto.

To achieve that, you will need to listen carefully to their concerns or worries about the project, and find ways to assuage them. Some common reasons behind an objection are:

- People are naturally wary of anything new, so their initial reaction to encountering your brand-new project idea is to automatically think of reasons why it's a bad idea, or what harm could come from doing it. This is especially true if your project is innovative or experimental. The way to get around this is to present the project in a way that relates it to something familiar (e.g. an email course is like a limited newsletter that's sent only when someone signs up), or show how it adheres to established principles (e.g. the Money Challenge sticks closely to longstanding newsroom rules around financial advice). If you have time, you can also try introducing the idea casually, hearing the initial objections and specifically addressing those when you formally seek their approval.
- Some people will say no because they worry that you will use their 'yes' against them, or that they are being forced to say yes, and risk themselves, for something they don't fully have control over. In these situations it is helpful to make it very clear exactly what you are asking them to say yes to. For example, at this stage you are only seeking approval for the overall concept of the project, and you can reassure them that they will have additional opportunities to review and approve the content of the actual project before launch.
- Sometimes there are legitimate concerns and disagreements. You may therefore need to adjust your project plan to get to yes. Or sometimes there is a genuine impasse and the project cannot go ahead. This is where having a clearly articulated core idea is helpful: it lets you know what you can change and let go of, and what you'll need to fight to keep.

You can also draw on data and statistics to support your argument. It can be helpful to quantify the success of previous, similar projects to build your credibility, and it can also be useful in explaining how the project's core idea came about.

Note, however, that at this early stage of project planning, any projections about the potential benefit and impact of the project are just that – projections. Whether someone chooses to believe your projections, or to question your assumptions and the reliability of your numbers, depends far more on other factors such as your reputation, their level of trust in you, the narrative you weave about the project, and their own motivations.

Getting 'official' green lights

The 'official' green light for a project should be its kick-off meeting, which will be covered in Chapter 3. However, because teams have different ways of working (particularly across different departments or functions), you may need to be aware of, and start in advance, other approval processes to formally secure team members' time or other resources.

This may look like:

- putting the project through a formal intake/prioritisation process
- securing an announcement at a team- or department-wide meeting or formal communication (for example, in a weekly update email)
- an email approval from a senior leader or veto-wielder

Setting project goals

What won't you do?

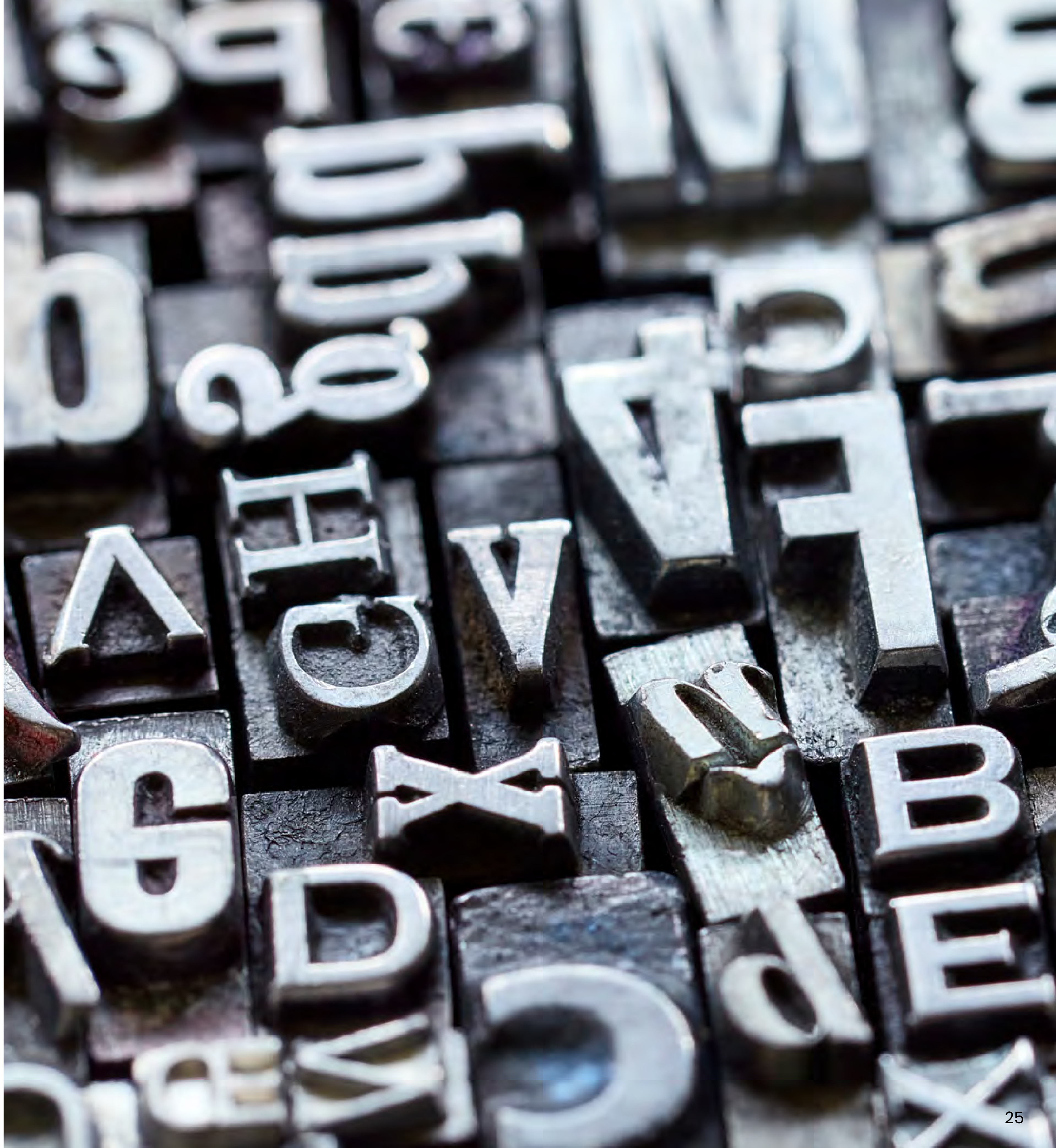
You might have lofty goals for your project, but the reality is there will be constraints on what you will be able to do. In order to make sure that your project achieves its goals, you will also need to set boundaries and agree on what you *won't* do in advance. In project management this is known as the scope – it helps to define the scope of activities covered by the project.

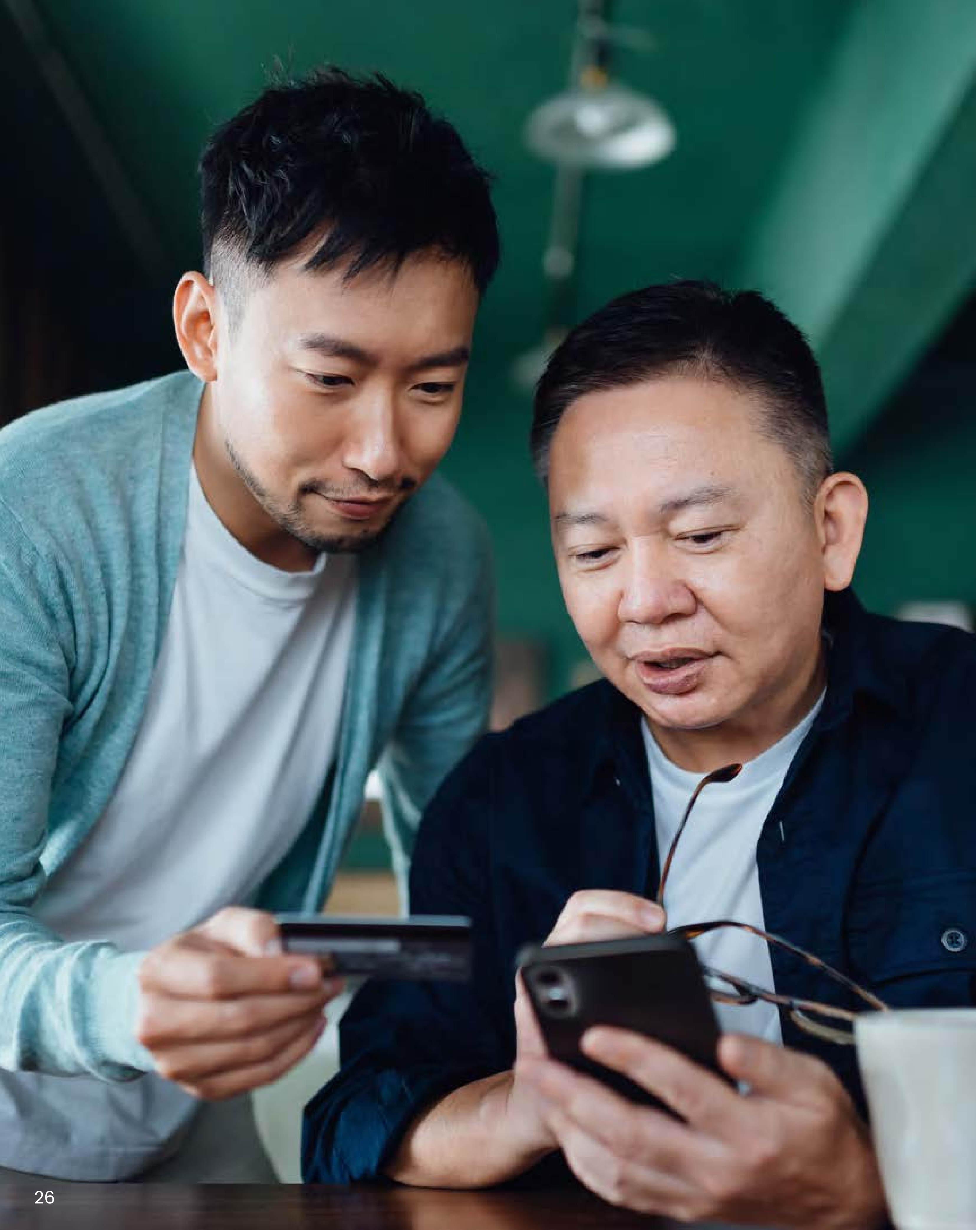
The difference between boundaries and constraints is that the first is internally imposed, and the other externally imposed (usually by limits on resources or time). Pre-agreed boundaries can be extraordinarily powerful, because they limit options and simplify decision-making when you are in the midst of executing the project, time is running out and stress is running high.

One of the biggest killers of projects is 'scope creep', where the project begins with a very tightly defined set of tasks and objectives that gradually expands as the project progresses, pushing back the launch date, until the project becomes an unwieldy morass that has strayed far from its core intention and has little chance of actually achieving its initial goals.

For example, we were *constrained* by resources from launching a national TV ad campaign to promote the Money Challenge. We *decided* to set the boundary of using only the simplest automation option (send the next lesson a week later) instead of creating a complex branching journey (i.e. send lesson 2A if the reader clicks on the 'beginner' button, and lesson 2B if they click on the 'expert' button).

Some adjustments to the project might be unavoidable because circumstances change, and Chapter 3 describes some basic change control processes to deal with those situations. However, you can make the team's work a lot easier by articulating, agreeing and recording up front what will *not* be part of the project. The more you are able to do so, the more you will be able to efficiently deliver on the work that *is* a part of the project.





Measuring success

The core idea of your project encapsulates the 'What' and the 'Why'. That's a good start, but you still have to develop this into a set of measurable success metrics to ensure that the finished project does, in fact, deliver on that core idea.

Just as it is useful to write down the core idea driving the project as a constant reference point, it is also useful to write down the main motivations for doing the project, what success might look like, and how you would know if you succeeded (i.e. how you would measure it).

Is the team working on the project because:

- You want the project (let's say it's a reporting series for a subscription-based news site) to be popular and reach new audiences?

  You might measure success by seeing if it reaches more people than comparable series in the past, or more people than the average article for your publication. Then, you might measure the proportion of non-subscriber readers (i.e. new audiences) and see how that differs from the average article.
- You want to test out a new technology?

  You might measure success simply by seeing if you're able to make it work as intended, and note down any limitations or bugs encountered.
- You want to create a really engaging, interactive experience?

  You might measure success by seeing what proportion of people who started the experience finished it. Do people talk about or share it with others?
- You want to enable really good reporting in covering an upcoming event?

  You might measure success by asking people who would recognise good reporting, for example, having a conversation after the project ends about the quality of the reporting with senior editors at your publication where you might compare the quality of your own reporting with that of your competitors.

If you struggle to come up with ways to measure success, try to home in and define the key terms you used in describing your goal. In the examples above, what does 'popular' mean? Who are these 'new audiences'? What does 'working as intended' mean? etc.

You should also be mindful that even if everyone agrees on the project's stated goals, they will all bring their own motivations and reasons for being involved. Your news organisation might also have broader strategic goals, and specific measures of success (or key performance indicators) for those goals. Understanding how your project goals align with everyone's individual goals as well as the newsroom's broader goals can be crucial to getting and keeping people on side.

How to set good goals and come up with the right measures of success can fill a whole book. The main thing to be careful of is to really think about whether your measure of success really does measure what you think it measures. For example, does having lots of people share the project really mean that it was an engaging, interactive experience? Or did your team simply optimise and prioritise the sharing functionality?

Once you have the green light to embark on the project, and are clear on its core intention, goals and boundaries, it's time to start convening the project team.

In the case of the Money Challenge, our goal was to test the idea of evergreen newsletter content, and email courses as a new content category for the WSJ. We measured success by seeing:

- **how many people signed up to the course (and if more people continued to sign up over time)**
- **what proportion of readers finished the course**
- **how the email course compared to our standard newsletter success metrics**
- **what readers thought about it (we asked them to email us with their feedback)**

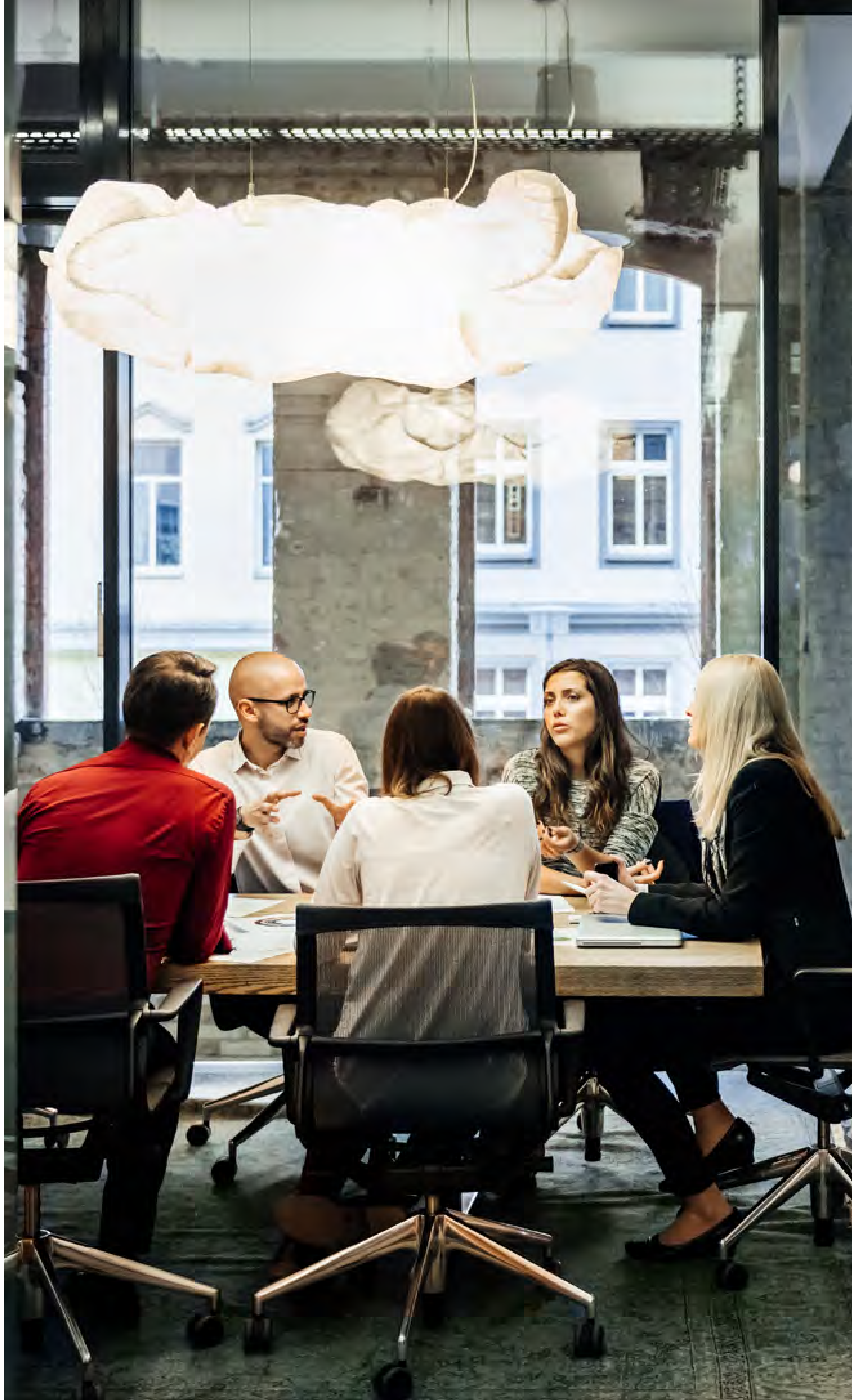
Assembling the project team

If the core idea covers the 'What' and the 'Why', the project team members comprise the 'Who'.

Projects have a defined beginning and end, and as such, project teams differ from other, more permanent teams within a news organisation (i.e. bureaus, 'desks' or product teams) in that they exist only for the duration of the project.

A project therefore involves different people in different ways and to different degrees, and that's OK. But the ad-hoc nature of project teams – especially in newsrooms without a strong project management culture – means that unless the project manager clearly defines, agrees and communicates members' roles with the team, you can easy stumble into a situation where the people involved do not know the other team members, their own roles or their levels of responsibility in relation to the project.

Therefore, it is helpful to articulate and get clear agreement on these at the planning stage.



Roles

I use 'roles' here to delineate the different skill sets and disciplines needed to complete the tasks that make up the project. The exact roles required for each project will naturally vary depending on the nature of the project itself. But since we are talking about newsroom projects in this guide, we can generalise somewhat and highlight common roles.

Roles and people don't always map one-to-one. A single person can take on multiple roles, and some roles require several people to fulfil. Mapping out roles is a good way to start understanding who, and what resources, you need to assemble in order to carry out the project. Sometimes this could lead to having to make tough choices about the scope of the project, so it is useful to list out all the roles needed for your project, even when you don't know who or how some of them will be filled.

To clarify your project roles and who fulfils them, simply make a list like the one below, and write down people's names next to their role. You should already have some of these pairings from the core team you assembled to get this far. This list does not need to be set in stone from the beginning – you just need a starting point.

As you better understand the steps or components of the project, you may realise you need additional roles, or the person you need for a certain role was not who you thought. For example, you may initially think you need an illustrator for just a few illustrations, but later realise that you actually need someone to provide more high-level artistic direction that includes commissioning illustrations.

Some common newsroom project roles:

- Reporting
- Project management/operations
- Distribution/marketing/SEO
- Editing/user testing
- Standards/legal
- Visual storytelling/illustration/photography
- Technical/software development
- Data analytics
- Design
- Audience interaction/engagement
- Writing
- Video
- Audio

In the case of the Money Challenge, we needed to fill pretty much all of the above roles except for video and audio. Some people took on multiple roles. For example, reporting and writing were done by the same people, while I took on both project management and data/analytics.

Responsibilities

Simply knowing what someone's role is doesn't actually tell us a lot about the degree to which they will be involved in the project. This knowledge is especially important when it comes to decision-making. Since so many people can be pulled into a project at different times, attempting to make collective, consensus decisions can quickly grind the project to a halt. But at the same time, a lack of clarity or agreement about decision-making responsibilities can be similarly detrimental, leading to either a single person calling all the shots (which is not collaborative and can create bottlenecks) or multiple people making contradictory decisions without communicating.

One common framework for managing and understanding these different levels of decision-making involvement is called RACI, which stands for Responsible, Accountable, Consulted and Informed. There can sometimes be overlap between Responsible and Accountable (i.e. someone can be both responsible and accountable) but otherwise people generally belong in only one of these categories. Best practice is to have only one person responsible (and accountable) to ensure clarity of roles. If more than one person is involved in doing a task (responsible) then that task should be broken down into more detail so that one 'R' can be assigned to each task/activity.

In the case of creating the art that illustrated the Money Challenge, this was our RACI chart:

Responsible – Tammy, our designer

Accountable – Design director (i.e. Tammy's boss)

Consulted – Personal finance reporters and editors writing the email challenge, as well as the marketing team who will be using the art.

Informed – Other newsroom leaders and editors, and the rest of the newsletters team

This separation of responsibilities helped us avoid a 'too many cooks in the kitchen' situation. Once Tammy understood the written content of the emails from consulting the personal finance reporters and editors, she could quickly iterate through several designs without needing to wait for approval from a wide group of other people. Meanwhile, marketing could be reassured that they would be consulted before the designs are finalised.

One thing that trips many people up when using the RACI framework is that they don't clarify what decisions the framework is being applied to. For example, it can be easy to fall into a rabbit hole of trying to define a RACI for deciding the headline of an article vs the RACI for deciding the user interface of a news app. You should apply the RACI framework to key activities in the project, so, for example, the project manager might be responsible for the governance and reporting process, and the technical team leader accountable for the technical solution.

Accountable

The person held accountable for the success of the project in achieving its goals and objectives. He or she may not be responsible for doing the actual project work, but this person will be the person approving/signing off on the work.

Responsible

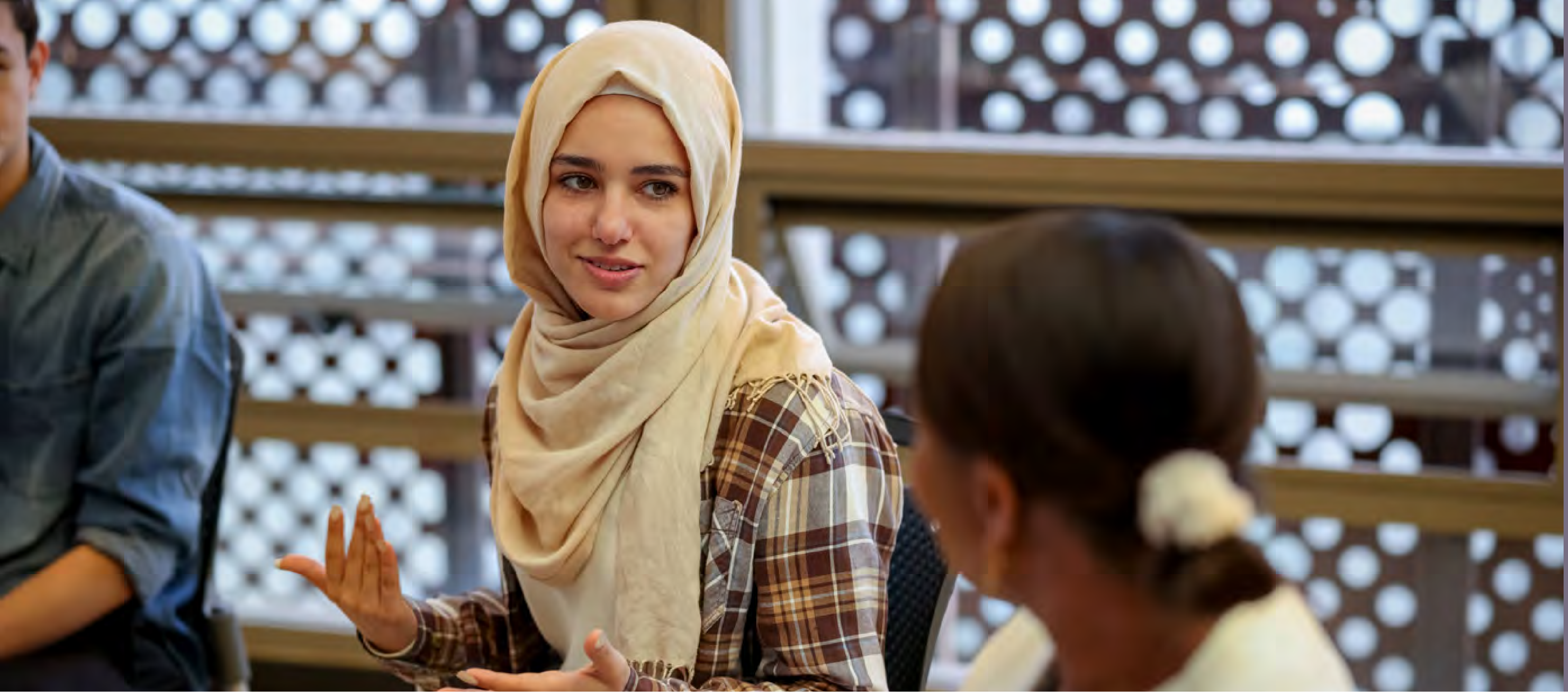
The people actively doing the actual work. They should be making most of the day-to-day decisions for the area they are responsible for, i.e. how the project is done.

Consulted

These are people not actively working on the project. Their input (views/opinions) are considered important and can sway a decision, but they do not have the final say.

Informed

These are people who are not actively working on the project, but need to be kept informed of its progress and status. Their input should have no influence on project decisions (otherwise they should be placed in the 'Consulted' category).



The keeper of the core idea

What about your own role? Since you are reading this guide, chances are that you have taken on at least some of the responsibility of managing a project and bringing it to fruition. This can be formal (you have been assigned to manage this project, or your job title is literally 'Project Manager' or 'Delivery Manager') or informal (you happened to take notes when the idea was first mooted).

You may also have different levels of responsibility or accountability in the RACI framework. On top of that, however, I have also found it really important to clarify whether or not you are also the keeper of the core idea. Remember how the core idea is the basic definition of the 'What' of the project? It is easy for it to get lost and muddied during the course of the project, especially as new people join the team and bring with them their own context and (mis) understanding.

The way to combat this is to have a clear and recognised keeper of the core idea, who acts as the tiebreak when there is disagreement over the project's direction or what tasks should be taken on as part of the project. This is often the project leader or the most senior person actively working on a project, and may not necessarily be you, the project manager. In product teams, for example, there is often a division of labour between the product manager/leader (i.e. the keeper of the core idea of the product), and the delivery or programme manager (i.e. responsible for the workflow and processes needed to deliver the product).

Get everyone to recognise the keeper of the core idea by explicitly assigning that role at your kick-off meeting or initial group communications. You can come up with your own equivalent term, but the grandiose nature of 'keeper of core idea' actually makes it easier for people to go along and entertain the idea, especially if you introduce it with a touch of humour.

A note on resources

Since most newsrooms have limited budgets, and digital editorial projects usually don't involve physical goods, I have focused this section on how to get the right people on board, rather than how to secure funding or other resources.

This is because I've found that resources are usually linked to people, in the sense that securing resources often boils down to convincing someone with access to those resources to help. There are also additional challenges when handling budgets and external contractors or service providers that are out of scope for this guide.

What if someone says no to joining the project?

You may not always get everyone you want to join the project. Nor, in most newsrooms, can you simply rely on your sponsors (the senior bosses and editors) to secure the resources and people needed.

People can say no for many reasons – they happen to be on leave during the project period, they or their bosses believe they should focus on other priorities instead, or their regular, day-to-day work leaves them with no capacity to participate. This can kill a project if they are in a critical role. But before you give up, here are a few options to consider:

- Is there an alternative or substitute? Might other people be able to fill in?
- Could you appeal to their bosses to re-prioritise some of their work? Could you help them with anything that might lighten their load and free them up to help with the project?
- Does the project have to be done now or can you shift the schedule to accommodate them?
- Could the project be modified to reduce its reliance on the role?

In the case of the Money Challenge, being able to bring our marketing team on board also means being able to use its marketing budget to help promote the Money Challenge.

To-dos and timelines

Much of the nitty-gritty work of project management is figuring out 'who does what, when (and how they do it)'. This may sound simple but complexities emerge when you consider the interdependencies within the team and how you might manage them.

Having covered 'What' and 'Why' with our core idea, and 'Who' with the project team members, it's time to figure out 'When' – i.e. the project timeline that describes when various pieces of work need to take place.

Outline first, fill in later

Start with the core idea behind the project. For the Money Challenge, it was:

"Create a limited-duration email course using our personal finance expertise to help readers become better at managing their personal finances. The course should be fun and give readers a satisfying sense of completion."

From there, think about what needs to be done for that idea to become reality, and write them down. Start with broad strokes and big milestones, instead of detailed sub-tasks.

For example, for the Money Challenge, this included:

- Decide on the structure and outline of the course.
- Write and edit the email editions.
- Create an overall design and look and feel for the course.
- Technical set-up for the course, including programming the automated sending of the email.
- Obtain stakeholder approvals.
- Create a marketing and promotion plan to get people to sign up, etc.

Once you have the big milestones, take one pass at breaking each of them down to figure what needs to happen to achieve that milestone.

For example, writing and editing the Money Challenge editions can be broken down into:

- Reporter files a first draft.
- Initial/first-round edit.
- Circulate to a wider group of senior editors/stakeholders for a second round of edit and changes.
- 'Cold reads' from people not directly involved in the project.
- Copyediting and final checking.

It's OK if you don't know at this stage how to break each milestone down. For example, we did not initially know what work would be needed to program the automated sending of the emails. That's OK – just put a pin in it for now.

You'll likely have a long list of tasks at this point, but there's no indication of how critical each of these tasks are to the project's completion. It's time to take another pass at your timeline, and prioritise the ideas by categorising them into:

- **Must-haves**: These are tasks that must be completed before launch. The project cannot launch without these being finished.
- **Nice-to-haves**: These are tasks that will make the project better, but will not hold up the launch if they are not finished in time.
- **Not-in-scope**: In reviewing your timeline, you may realise that there are some tasks that the team should not work on as part of this project. They may be good ideas, but doing them will effectively constitute a new project.

In the case of the Money Challenge, writing the emails was clearly a must-have. Incorporating a completion bar to let a reader know how far along they are in the challenge was a nice-to-have, and creating courses on other topics to turn this into a series of challenges was not-in-scope.

Cliff edges and bottlenecks

If your project is closely tied to an upcoming news event, then you'll naturally have a hard deadline for launch or completion, i.e. a constraint on delivery time. In other words, a cliff edge that you need to stop at before you fall off. There are other types of cliff edges – maybe a key team member will go on an extended leave in a month's time. Or, in the case of the Money Challenge, there was a window for capturing audience interest in embarking on projects taken up during the pandemic.

Even when there isn't an obvious cliff edge, there are always constraints to projects – namely the time, cost, quality and anticipated benefits of the project that form the originally agreed-upon scope. In newsrooms especially, projects are done by ad-hoc assemblies of people who have day jobs to return to. Letting a project drag on for too long without a clear deadline kills momentum, and therefore any prospect of the project being completed.

So if there isn't an externally imposed deadline, you should set one. Even if you set one that is a long way away, doing so will help keep work moving in the meantime instead of having the project stall and die, or result in a mad rush later to get it finished. At this stage, just think about it in broad terms: is this a one-week, one-month, one-quarter or year-long project? You should only fix the actual deadline later, in collaboration with the rest of the team, but it's useful to provide a sensible opening bid based on an initial 'best guess' estimation of how long the work will take to deliver.

The next thing to think about is bottlenecks, or dependencies. There will be some tasks that can be completed independently from each other (e.g. creating the social promotion images can happen independently of editing the email editions). Others depend on other tasks being done first (e.g. you can't edit the email editions until after they have been written).

What you are looking for here is not to map out every single dependency – you don't yet know enough about all the work that needs to happen to do that. Instead, you're just trying to identify the tasks that will hold up the most subsequent tasks. For the Money Challenge, one of these was deciding on the theme (personal finance) and the outline for each edition. Without having those, it was impossible to start writing, to start working on the illustrations, and to start figuring out how complex it would be to program the automated course in our email service provider.

Timeline planning is best done collaboratively

Your job as a project manager is to ensure the team has a timeline and sticks to it, but that doesn't mean that a timeline that you've drawn up by yourself will be accepted by the rest of the team (in fact, it almost certainly won't). That is why we have kept things at a broad, high level so far. We want to enlist the team's help to flesh out the to-dos and the timeline, so that they have a degree of control over it instead of feeling like they have simply been assigned work.

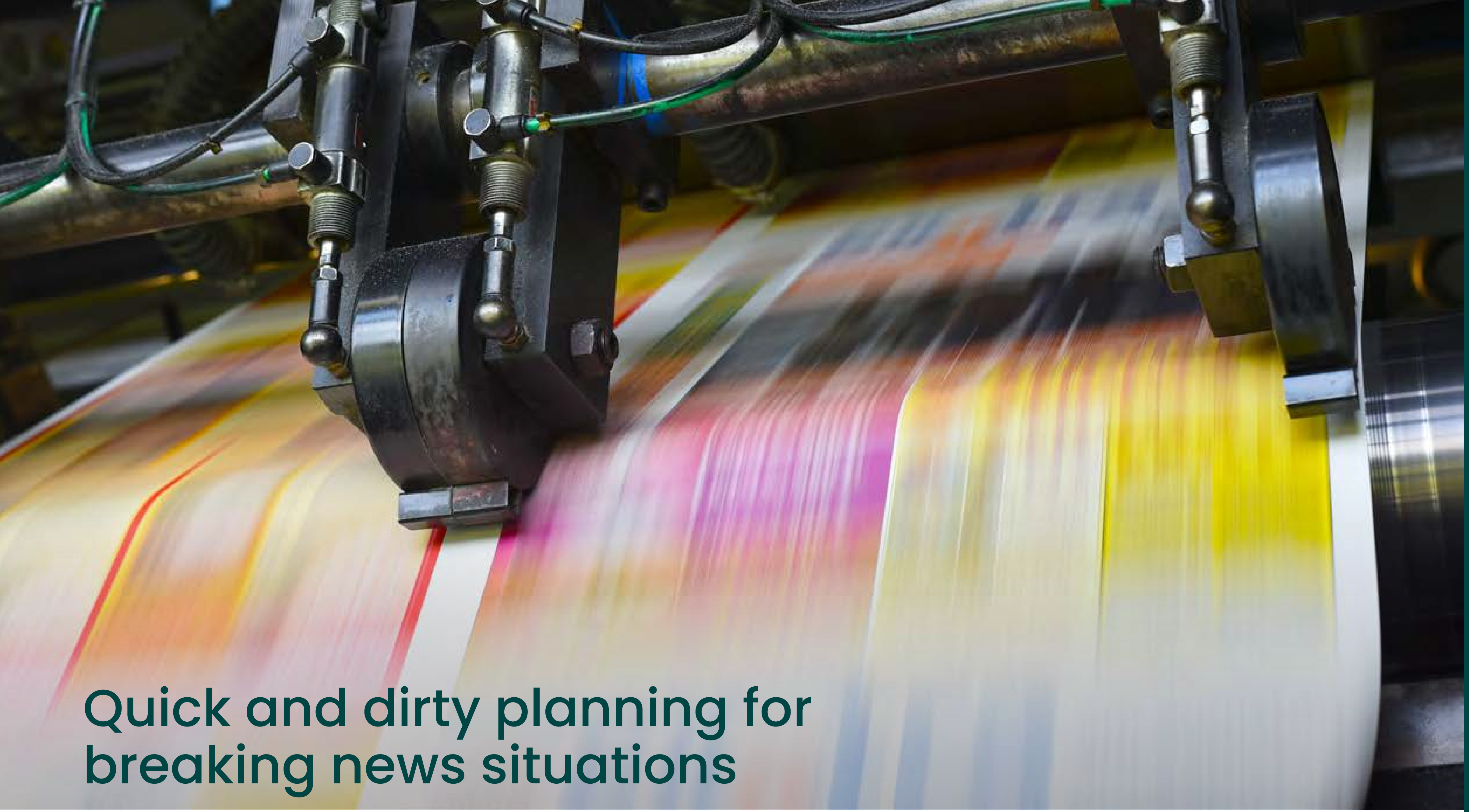
This negotiation will likely take place multiple times. You'll need the core team members and stakeholders' input to build a first version of the timeline. This will come under review at the kick-off meeting (more on that in Chapter 3), which may then lead to further discussion and adjustments. What you are doing now is simply preparing the opening bid and providing the broad outlines that will shape and focus those discussions.

Building the timeline collaboratively allows you to make life easier for yourself by, for example, leaving the detailed timeline planning for an entire section of the project to another team, because they are better placed to do so. In the case of the Money Challenge, the marketing team came up with its own timeline for preparing to promote the email course. Instead of micromanaging their timeline, I only needed to agree with them on the delivery of materials (i.e. the name and tagline, visual assets, etc) they needed from other teams, and when they would launch their promotion (i.e. fix a launch date for the project).

Did you miss anything?

It's hard to anticipate all the tasks that need to be done to complete a project, especially if it is a large, interdisciplinary one and you, as the project manager, have a background in only one of those disciplines. For example, as a journalist project-managing a big reporting series, it's easy to think of data analytics as something that only needs to be thought about after the project is done, instead of anticipating that you might need the right tracking codes in place ahead of time.

Completing the timeline collaboratively with the rest of the team will help avoid this by giving others the chance to point out gaps you might not have been aware of. You can also go back to your list of roles to see if your to-dos and timeline have incorporated the work that needs to be done by all the roles. It is also prudent to include some contingency time and budget in the planning to cover the things you've not thought of.



Quick and dirty planning for breaking news situations

What if you don't have the luxury of time to go through all the steps above and write out core intentions, goals, boundaries, lists of allies, RACI charts, to-dos and timelines? Perhaps a big news event has just happened and you've been asked to pull together a plan for the second wave of stories to be published in a week. Or you've been dropped into the middle of a stalled project and told to "make it happen" before the end of the month.

If I only have 15 minutes to sit down, think and come up with a plan, here's what I would do:

- Using one, or at most two sentences, and without wordsmithing your answer, write down the answer to: "What is the project?"
- Instead of thinking, "Who do you need?" (to be your key allies or team members), ask, "Who do I have, and who do I need to pull in?" Write the names down.
- Forget mapping out roles and responsibilities for now. Instead, brainstorm and write down some of the potential big components of the project (in the case of the 'second wave' stories, perhaps it's a big set piece, a video or an explainer, or simply making sure that there is a new story to push out every day in the second week). Write those down.
- You'll likely have very clear and vertiginous cliff edges. Focus on identifying the bottlenecks and figuring out how to ensure those won't delay the project past its deadline. Also, identify the first thing that needs to be done. Write those down.
- You should now have a basic project document outlining what you're trying to do, who you have initially, some big milestones and a very rough timeline. Congratulations! You have made a plan in 15 minutes.

Circulate this document to get feedback and agreement, and to get people started on the first thing that needed doing.

- You may still want to go back and fill in some of the other things later on, or you may find that events are moving so quickly that it's moot to map out a RACI chart (it's not that there is just complete chaos in who makes decisions if you don't write out and get everyone to agree to the RACI chart. What is happening is that people are falling back on the usual organisational divisions of decision-making responsibility in the absence of special arrangements around the project).

In summary

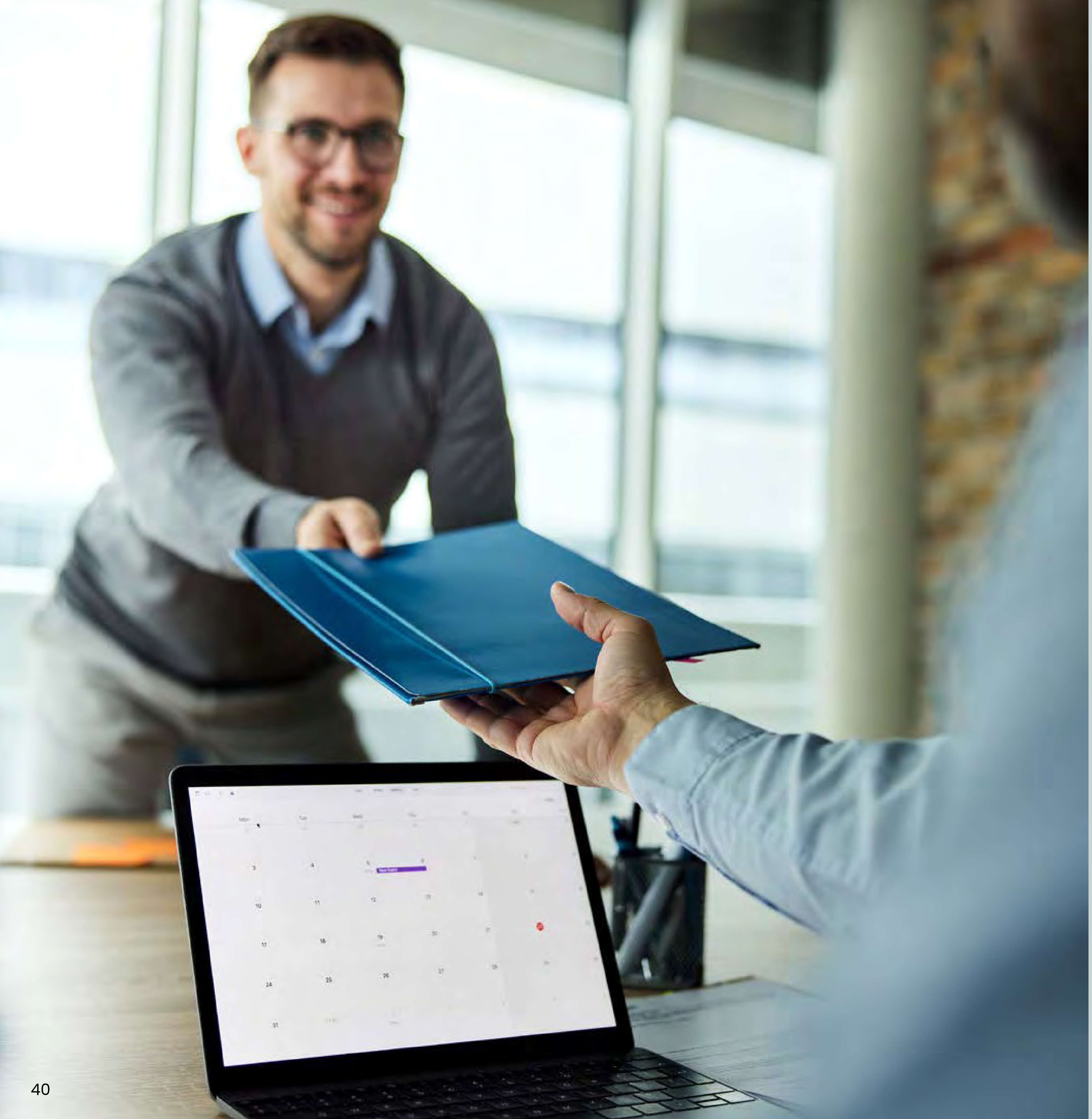
By this stage, you should have all the pieces in place to formally kick off work on the project. This includes having:

- a clearly articulated core idea for your project
- a set of goals for what you hope the project will accomplish
- a sense of the scope of the project that arises from the core idea
- 'green light' in the sense of commitment from core team members and no active objections from the veto-wielders
- a clear mapping of the roles and responsibilities needed for the project team, and participation from the people to fill those roles
- a rough sense of the to-dos and the key milestones in the project timeline

The format in which these are captured doesn't matter too much for now, but at the very least, you should have a project brief document that can be easily circulated, which concisely informs readers about what the project is, why you are doing it, and what success would look like.

As work on the project starts, and more people become involved, you will need more robust documentation and communication to answer more questions about the project. This will be covered in the next chapter, which will also guide you through how to manage changing circumstances as the project progresses.

All of this will be covered in Chapter 3, Project execution.



Chapter 3:

Project execution

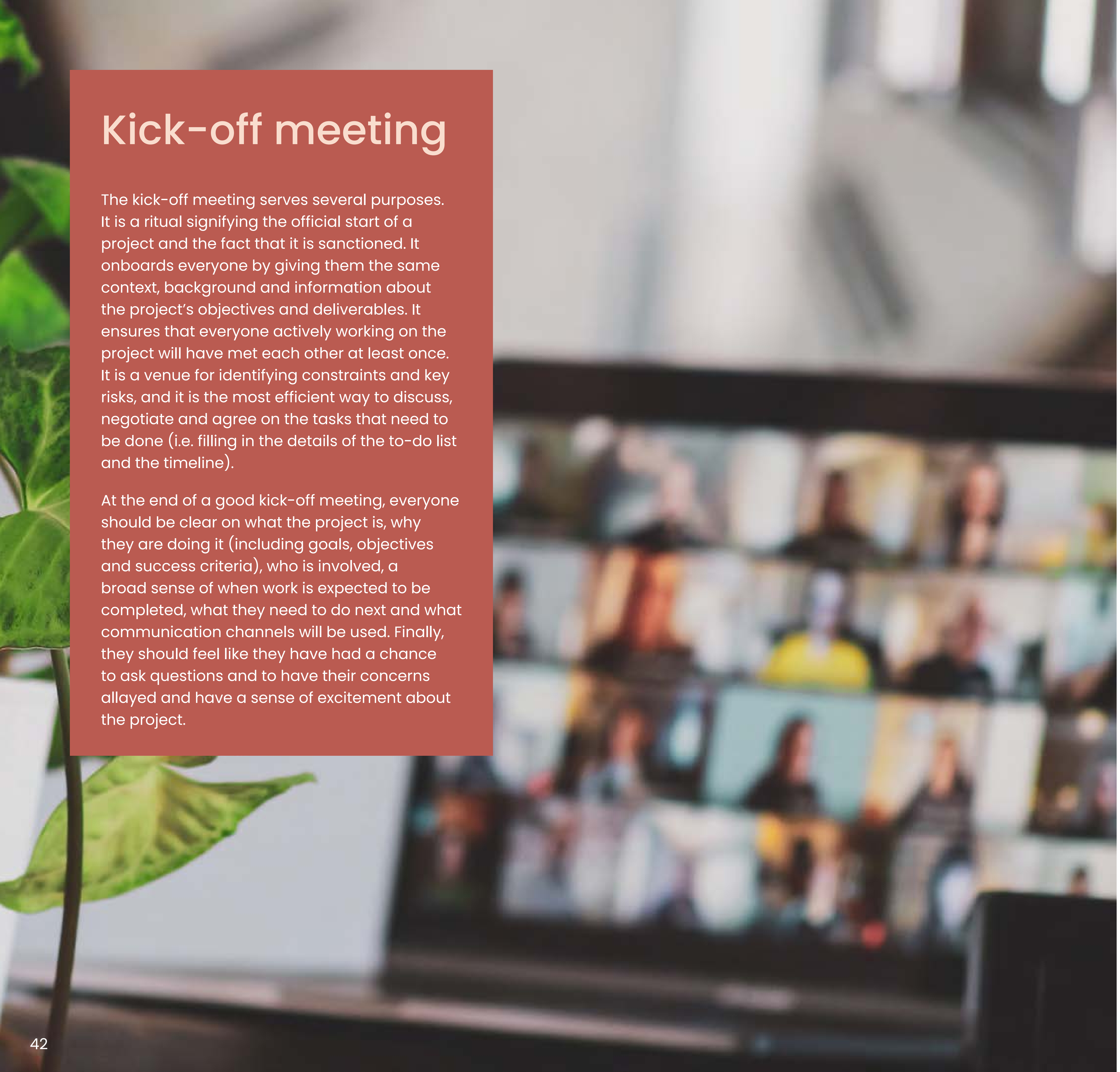
In an ideal world, this chapter would be pretty much non-existent because, having planned the project to perfection, everything will click into place like clockwork and you, as the project manager, can sit back and relax while everyone else does their part.

This, of course, never happens in reality. You still have to convene everybody to officially kick off the project, and make sure they understand and agree to the project's goals, objectives and scope. Moreover, as a project progresses, new information is uncovered, unexpected challenges arise, people forget or renege on what they had previously agreed to, and compromises have to be made.

This chapter is all about fostering collaboration and managing group dynamics. During this project execution phase, your job as a project manager is to:

- react and creatively find solutions to problems and unexpected situations as they arise
- keep communication lines clear, open and frequently used
- know when to be flexible and deviate from the plan, and when to stand firm and enforce deadlines
- keep the bigger picture in mind (in collaboration with the keeper of the core idea), and look several steps ahead
- maintain momentum
- document as you go

This usually begins with the kick-off meeting.



Kick-off meeting

The kick-off meeting serves several purposes. It is a ritual signifying the official start of a project and the fact that it is sanctioned. It onboards everyone by giving them the same context, background and information about the project's objectives and deliverables. It ensures that everyone actively working on the project will have met each other at least once. It is a venue for identifying constraints and key risks, and it is the most efficient way to discuss, negotiate and agree on the tasks that need to be done (i.e. filling in the details of the to-do list and the timeline).

At the end of a good kick-off meeting, everyone should be clear on what the project is, why they are doing it (including goals, objectives and success criteria), who is involved, a broad sense of when work is expected to be completed, what they need to do next and what communication channels will be used. Finally, they should feel like they have had a chance to ask questions and to have their concerns allayed and have a sense of excitement about the project.

The invite

The kick-off meeting should be like a mini-town hall: with a big audience, open to all who are interested (i.e. everyone listed in your RACI chart should be invited, and anyone else who wants to come should be welcomed). Depending on the size and culture of your organisation, however, this could easily lead to a *very* large meeting that becomes unruly or unmanageable. There are some ways to mitigate this:

- Make clear in the invite that all information about the project, including the decisions that will be made in the kick-off meeting, will be sent to everyone on this invite list. In addition, emphasise that you are available to talk with them if they have any suggestions, concerns or thoughts about the project upon reading that information. This should reassure everyone who is to be 'consulted' or 'informed' that they do not actually *need* to be present at the meeting.
- Note in the invite that, because there are a lot of invitees to this meeting, you will have to heavily moderate discussion, run it as a very tight meeting, and prioritise letting the core team members speak to keep it on track. Reassure people that they are welcome to follow up with you afterwards if they feel that any of their concerns or thoughts were not addressed in the meeting. This will help set expectations up front and allow you to be more heavy-handed in stopping the meeting from becoming unruly.
- If there are specific people you are worried about disrupting the meeting, you can try talking to them individually ahead of the meeting to explain how you would like them to behave during the meeting. They may not even be aware otherwise that their behaviour can be considered disruptive, and may adjust their behaviour once you've spoken to them. Even if they don't do so, you will at least have given them a warning ahead of time.
- You *could* also invite only the core team members to the kick-off, but inviting a larger group so that they feel involved in the project from the outset can actually help with some of the other pain points and conflicts that could surface further down the road (for example: "You should've looped me in earlier!" More on this later in this chapter).

One other challenge in making the kick-off meeting as inclusive as possible is that it makes it very difficult to schedule the kick-off at a time when everyone can attend. When fixing a time, you should prioritise the schedules of those who are 'Responsible' and 'Accountable'. In particular, you want to ensure that the people who have the expertise to help you fill in the missing sections of your to-do and timeline are there. You should come away from the kick-off meeting with documentation (more on that later) to share with those who couldn't attend.

Here is an example invite email for the WSJ Money Challenge kick-off meeting

Hi everyone,

You are invited to the kick-off meeting for the WSJ Money Challenge project on Thursday 6 May at 3pm in the XXXX meeting room and Google Hangouts.

With this project, we are aiming to create a limited-duration email course using our personal finance expertise to help readers become better at managing their personal finances. We'd like the course to be fun, and give readers a satisfying sense of completion, and are tentatively looking at publishing in July.

You can find more information about the project plan in the attached document.

The meeting will be an hour long. There's a lot of you from different departments on this invite (we wanted to make sure everyone who needed to know about this has a chance to come and ask questions) so it's quite a tightly programmed hour. I will be keeping things moving along but you can always follow up with me afterwards if you have any questions or concerns that we don't get to in the meeting.

Everything is documented in the project brief document and we will send everyone a summary after the meeting, so you won't miss any substantive information if you can't make it. The project is only just getting started, so everyone will have ample opportunity to ask questions and raise concerns, both at this meeting and afterwards.

Here's the meeting agenda:

- Intro (5 mins)
- Defining terms (5 mins)
- Project goals and objectives (15 mins)
- Timelines and to-dos (20 mins)
- How we'll communicate (5 mins)
- Next steps (5 mins)

Looking forward to seeing you there!

Best wishes,

Robin

The meeting intro

Start the meeting by introducing yourself, recapping what the project is about (i.e. the core idea), giving a reminder of the agenda for the meeting and, if there's a strong chance that people who are there won't all know each other, doing a quick round of introductions.

Clarify and define terms

This is especially important if the project pulls in people from different departments or disciplines. Re-read your project brief before the meeting, and note down any jargon or terms used to describe key parts of the project. For example, what do you mean by 'wireframes', 'hed', 'dek', 'MVP', etc.

At the kick-off, say something to the effect of: "Before we get going, I want to take just a few minutes to make sure that everyone has a common definition of the terms we've used in the project brief. I've picked out a few to go over with you, but if there are any other terms you don't understand, or if there's anything else you want clarified, now would be a great time to ask." Besides its ostensible goal, this five-minute exercise introduces audience participation early, and prevents the kick-off meeting from being just you talking at everyone for 30 minutes.

The parking lot

You may, however, need to use the 'parking lot' technique here to keep the meeting rolling. To do this, create a space labelled 'parking lot' somewhere that is visible to the group. This could mean writing it on a whiteboard, putting a Post-it note with those words up on a board, or creating a section called 'parking lot' in the shared project brief doc or on a Miro or Jamboard. When someone raises a broader question that you already plan to address later on, or if they raise a point that could derail the meeting by leading to a big argument, you should interject to say that you recognise their question/point, and we'll address it later in the meeting. You should then write their point down in the 'parking lot' section. This helps make people feel heard, and gives reassurance that you are not simply brushing them off.

What are we hoping to get out of this?

After getting everyone oriented and familiar with the project, the next step is to reaffirm commitment and broad alignment among the project team. There are two ways to do this, depending on how many people are at the kick-off meeting and whether they are mostly project team members, or if there are a lot of spectators/stakeholders/people who will not be directly involved in the project present.

In the case of the latter, you should recap the goals and objectives, and check in with the group to see if there are other goals that this project should try to achieve, or if the existing goals capture what people want out of this project. You should then do the following exercise at the next meeting, when it will mostly be project participants attending. If it's the former, you can just do this exercise directly at the kick-off meeting:

Set a timer for two minutes, and ask everyone to individually write down what they personally, or for their teams, want to get out of being part of the project: how does doing this fit into their team goals, or, what motivates them to be a part of this? Volunteer your own motivations as an example. Give everyone two minutes to think and write down their answer, then go around and have them tell the group. As they do so, you should summarise and write their answers down.

This exercise is designed to help the team bond quickly by helping everyone understand each other's motivations, and for the team to show each other that it is a safe space to talk about something that usually goes undiscussed.

Timeline discussion

Time to move on to the to-do list. Without referencing the timeline for now, talk through the main components of work that you outlined in your project plan. Check with the group to see if you have missed any major components. Then talk about the boundaries, again checking in with the group to see if they agree with the boundaries, or want to set additional boundaries. Once you have done that, take each component and as a group, collectively talk through the tasks that need to be done to complete that component.

For many meeting participants, this will be their first opportunity to shape the project, and to think expansively about what the project could encompass. This is therefore a section of the meeting that can easily become unruly, or turn into a bit of a brainstorming session (particularly from the spectators/other interested parties who will not have to work directly on the project). Senior stakeholders may also use this opportunity to highlight or re-emphasise the aspects of the project they particularly care about.

You will have to be active in managing this discussion, and will likely have to frequently refer back to the core idea and agreed-upon scope to ensure that the timeline is realistic and the deliverables are aligned with the project goals and objectives.

Filling in the rest of the timeline

By categorising the tasks, you are already part of the way through filling in the rest of the timeline. Talk through the main cliff edges and bottlenecks that you have identified, and introduce the timeline you prepared as an opening bid to the group.

The most important thing for this part of the discussion is that you have to come away with exact dates written down, even if everyone agrees that those dates are subject to change and circumstances. Setting concrete deadlines makes things real for people in a way that vague promises to "have this part done in the next week or so" don't.

Always build in time for contingencies

You should always factor in extra time in your timeline for any unforeseen delays. If you have a fixed final deadline, this means creating an earlier deadline by which the project is meant to be done or launched, and planning the rest of the timeline around that. This can range from just one or two days if it is a short project, to an extra week if it is a two to three months-long project. I know this goes against the stereotypical journalist's instinct to work right up until the deadline, but hopefully the previous work of identifying bottlenecks and dependencies – and having the peer pressure of everyone in the room agreeing to an earlier deadline – will help.

In fact, pushing the deadline up to allow for delays can help streamline the project by making everyone reconsider whether everything that was listed under the 'must-have' column is, in fact, critical to the success of the project.

Communication channels

Your project will need several different channels of communication to serve different purposes, listed below. As the project manager you have the responsibility and freedom to set this up for the team, and the kick-off meeting is a good occasion to let everyone know how communication will work going forwards.

- **A working channel.** This is a place for high-frequency, day-to-day communications. Its active participants should be restricted to those directly working on the project. It is the place where any project team member can reliably get hold of, or work with, another team member to resolve issues that come up. Messaging platforms like Slack or Microsoft Teams are designed for this type of communication.
- **Regular project team meetings.** This is a regular meeting for active participants in the project to sync up and discuss issues as a group and to maintain momentum. This is also where you, as the project manager, tell everyone whether the project is on track or not (and collectively figure out what to do if it is running behind schedule). This is generally a weekly meeting for longer-running projects, or a daily one for quicker ones.
- **A source of truth about the project and its status.** This is for anyone and everyone who wants to know the fundamentals of the project (core idea, goals, RACI, etc) and its current status. It should be clear, concise and kept up to date. Your project brief should be kept clean and up to date so that it fulfils this function.
- **Updates at key junctures for those not directly involved.** These are less frequent, larger group communications that can take the form of either a meeting or an email. They are most useful for those in the 'accountable' column of the RACI chart, as well as for team members who have less direct, and later involvement with the project. The project manager is responsible for these, while active team members probably don't need to be in this channel at all since it repeats information they should already know.
- **Ongoing documentation and reference.** Unlike the 'source of truth' document, which provides an up-to-date snapshot of the project, this has the full log/history of the project (i.e. meeting minutes) as well as links to any reference material (i.e. technical spec documents, competitive analysis, background research). As such, this should be a separate document from the project brief.

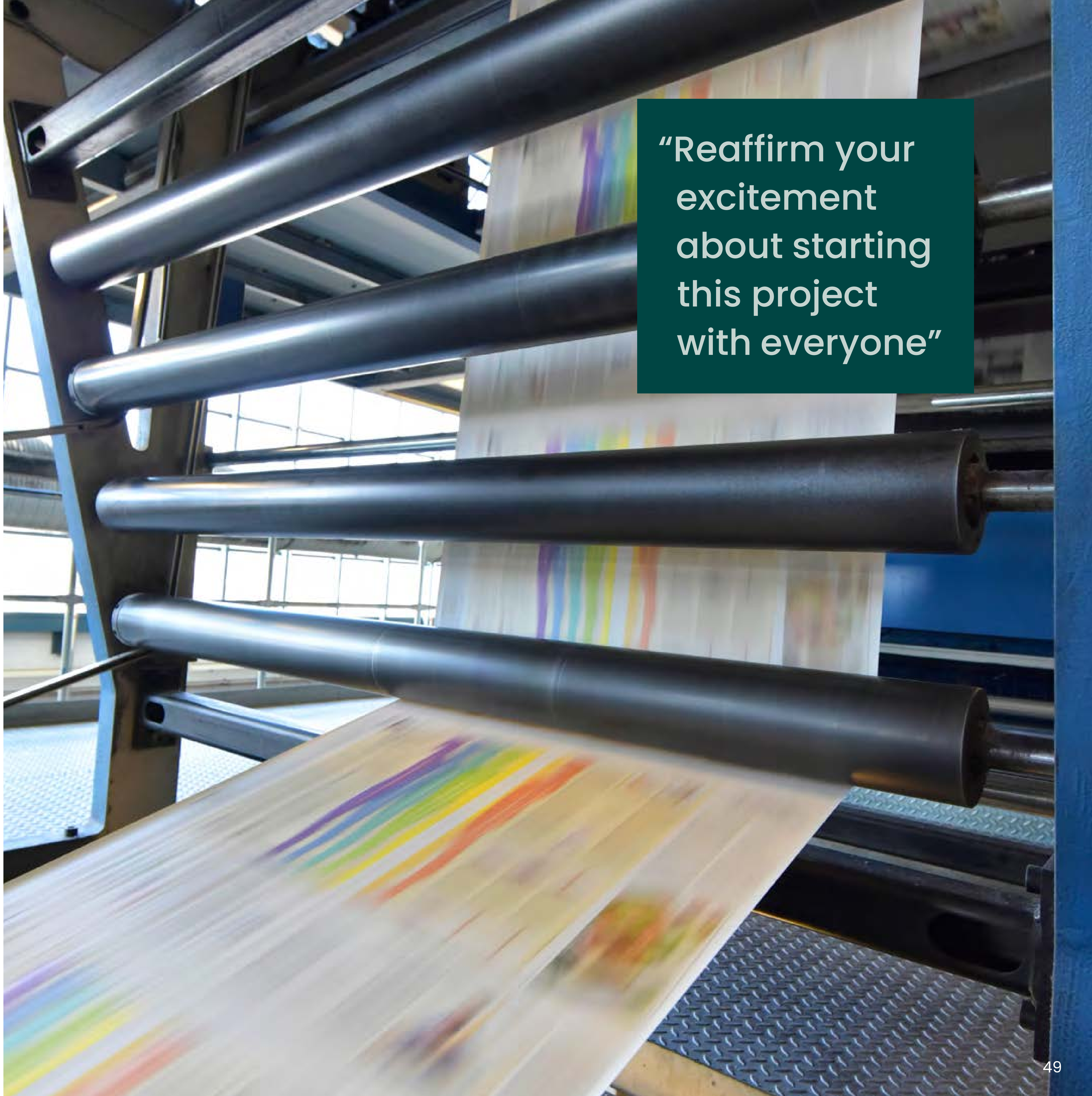
Some active team members may need to refer back to previous discussions and reference materials, but this latter channel is mainly to help you to prepare post-project presentations and retrospective meetings. In addition to keeping a log of what happened or what was discussed, you might consider annotating it with your thoughts on what went well and what didn't, as well as any topics to bring up during the retrospective meeting. Taking these notes as you go along becomes more important for long-running projects, where you may well have forgotten the initial meetings and discussion by the end of the project.

Wrapping up

The meeting should end with a commitment to the plan and an agreement on next steps, which hopefully has emerged from the timeline discussion. It's worth explicitly checking that the active participants of the project know what they need to do next, or what they are waiting for before they can begin their portion of the work.

For the non-active participants (stakeholders and spectators), you should tell them when they should expect the next update. This does not need to be a specific date, but could instead be tied to a milestone, i.e. "We'll check back in with everyone and seek your feedback again once we have decided on the theme and the structure of the email course."

Reaffirm your excitement about starting this project with everyone, and close the meeting (hopefully within the hour mark).



> "Reaffirm your excitement about starting this project with everyone"

While work gets done

As the project progresses, you have three main responsibilities as the project manager: *awareness*, *communication* and *decisions*.

Awareness

Because of the division of roles and responsibilities, you are the only person who is in a position to have an overview of the project. You are also likely the person that team members will turn to when they come across a problem that they cannot resolve by themselves. So while you might not be the first to know about a problem or a new development, you should be the first to become aware of *how* it would impact the project as a whole.

The trick here is to balance the need to know enough about new developments in a timely manner, to achieve that awareness, against the need to avoid micromanaging team members or otherwise affecting their ability to get the work done or to make independent decisions using their expertise.

Monitoring the working channel and setting up regular sync-up meetings can help you achieve that balance, but there is no cookie-cutter solution – you'll just have to rely on your experience and pre-existing relationships and knowledge. There are also a host of task management tools and approaches out there to help (Kanban, Jira, Gantt charts, Airtable, etc), depending on the complexity of the project. Use what works for you and your team, but just make sure that you are moulding the tool to suit your project needs, rather than the other way around.

Communication

What do you do with that awareness? You should use it to shape what and how you communicate with the rest of the team and with stakeholders and others who need to be informed or consulted. In practical terms, this largely consists of setting up and tending to the five communication channels outlined in the previous section.

A lot of the art of getting group communications right comes down to judgement. Specifically, you should see your job as acting as a filter to make sure the right information gets passed on to the right people at the right time. It's about striking a balance: communicating every little detail to everyone is inefficient, boring and annoying, while withholding key information until it's too late to act upon it is a guaranteed way to make people mad at you.

A quick note here about ego. Information is power, and as the person who holds and is responsible for disseminating information to everyone else, it's easy to get drunk on that power. You may also feel that you need to be actively exercising control in order to do your job properly as the project manager, and manipulating information flows is a powerful way to *feel* like you have control.

This is unproductive, because the nature of collaborative work means that you can't ever truly have full control over what happens. Be aware of when you are wielding your power responsibly in service of the project, and when it crosses the line to wielding your power and controlling information about the project just so that you can feel important.

How you act will also be influenced by the culture of the newsroom (or, the culture you are trying to foster in the newsroom). Some newsrooms tend towards looping everyone in and are comfortable dealing with information overload, while others tend towards more siloed communications and are more comfortable dealing with surprises.

Decisions

No plan survives the reality of a busy newsroom with competing priorities, teams from different disciplines that are probably not used to working together, and the usual project constraints of imperfect information and limited resources.

As the project progresses, new decisions will need to be made. You will make some of them, but your job is primarily to ensure that the right people are involved in making the decisions, and to communicate those decisions to the right people after they are made.

This can become complicated if there is disagreement over the decision that needs to be made. Conflict mediation and resolution are broader topics than can be covered in this guide, but you can keep your project on track in the face of new developments by putting some basic change control processes in place.

For example, you can keep a log of proposed changes (and note how each relates to the core idea or would help the project better meet its goals and success metrics) as they come in, and then review them as a team during your regular project team meetings. The RACI framework helps lay out who should be involved in the decision-making (i.e. those who are responsible have a greater say than those who are consulted); the keeper of the core idea is assigned to be the final decision maker on decisions that affect the entire project.

Regular project team meetings

Just as the kick-off meeting functions partly as a ritual to signify the official start of the project, regular project meetings are also a ritual that helps maintain momentum. Every week (or day, if it is a short project), everyone actively working on the project makes time to attend, so it's clear they have skin in the game. In addition to the practical purpose of the meeting (i.e. to coordinate work, to make collective decisions, to disseminate information), it generates a sense of collective effort and an expectation that the team will make some progress every week before it meets.

It is therefore your job as the project manager to keep on top of the meet-ups. This means starting the meeting on time, keeping the meeting short and purposeful, and making sure that a core group shows up every time unless there's a good reason why someone can't make it. There are ample resources available on how to run efficient meetings (set an agenda, have a clear purpose, etc).

They are also practically helpful in keeping the project on track, by being a venue to discuss proposed changes and troubleshoot problems. You can also model these meetings after stand-up meetings in product management, as they serve similar purposes.

Keeping stakeholders informed

The best way to keep stakeholders informed is to provide them with regular highlight reports, usually a one-page summary of progress and outlook. This still leaves room for you to tailor the reports' frequency and format to the project particulars, your organisation's culture and the preferences of the individuals involved. In addition, you might want to consider:

Where can they dig deeper?

Updates naturally focus on the latest progress, but stakeholders might need a refresher on the broader context for the project as a whole. Keeping the project brief/project status doc up to date, and linking to it consistently when giving updates, is a good way to give them the option to dig deeper if they need to.

What can they expect next?

After the current update, when will they next be briefed, and what is the next phase of the project? Telling stakeholders this is particularly important if you are only giving them irregular updates when milestones are reached. But even if you are giving regular updates, it helps to set the latest information in the context of the broader project.

When do they need to pay attention?

Most of the time, a project update serves the purpose of giving reassurance – i.e. the main information the stakeholder needs to glean from the update is the fact that the project is progressing smoothly, rather than any of the particulars. Sometimes, however, you need them to pay attention and to become involved (particularly if they are 'accountable' or 'consulted'). At those moments, you need to make sure you grab their attention (for example, by literally prefacing the update with ***IMPORTANT***).

These tips may seem like small details, but when applied consistently over time, it builds trust and your reputation as a project manager. This sets off a virtuous cycle because that trust and deeper relationship make it easier for you to manage future projects. Remember: a project may be a one-off, but your working relationship with those around you is a longer-term affair.

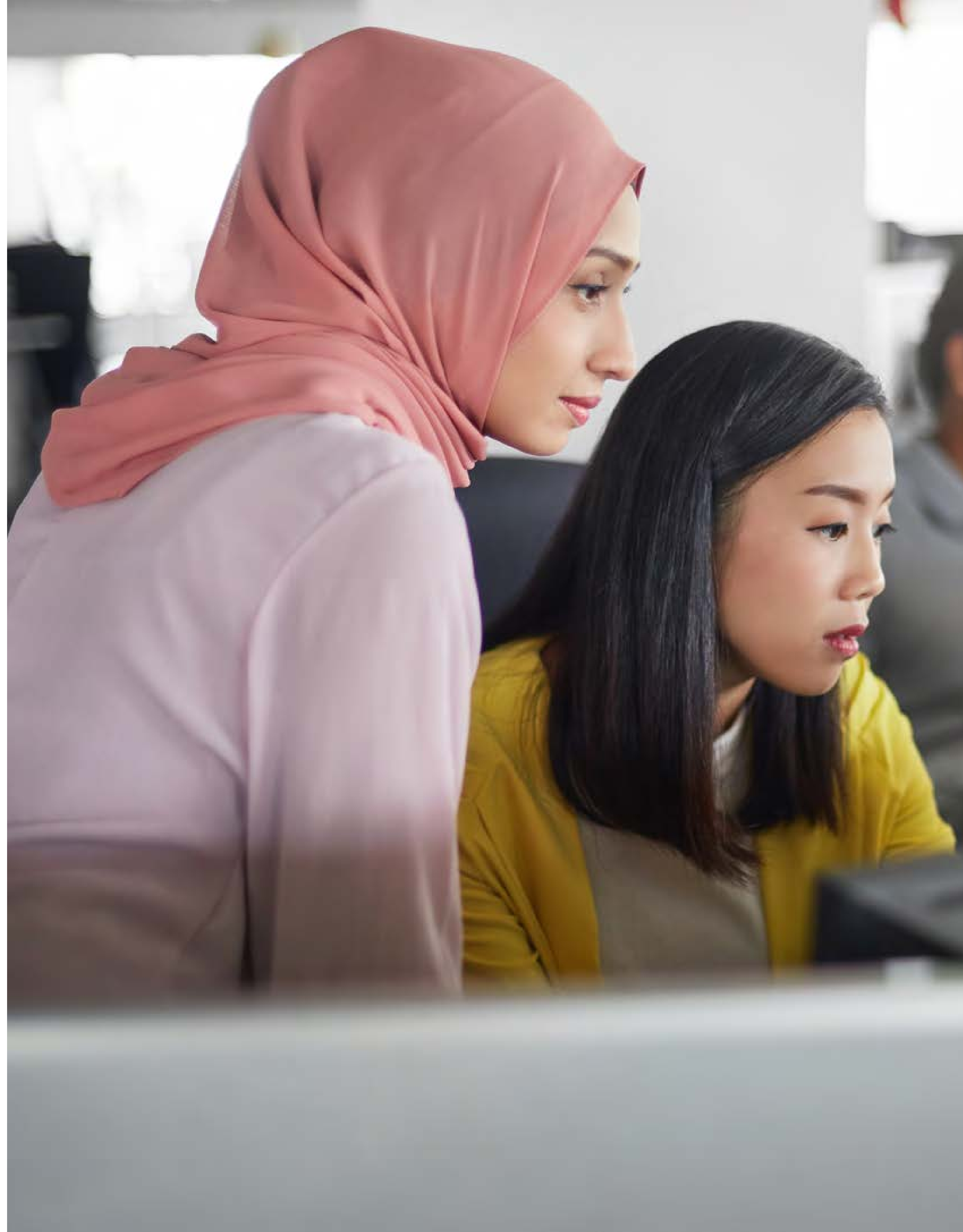
Be adaptable

As the project progresses, your approach to managing it, and where you focus your energy, might need to change. For example, the early phase might be more exploratory and you are therefore setting up a lot of discussion-driven meetings or brainstorming workshops. The middle phase of the project might have different individuals going off to work on their own part of the project while you are focused on communication. In the later stages as the launch approaches, the different work streams will likely converge again, and your focus will narrow down to a 'punch list' of to-dos.

A quick note on implementing analytics tracking

In order to be able to see how the project performed after its launch, the right tracking needs to be put in place ahead of launch. This tracking may already come with the tools you are using, or it may require custom implementation. For example, for the Money Challenge, we wanted to know how many people opened all six editions and also we wanted reader feedback on the course. Email opens are automatically tracked through our system, but we needed to make sure to have something in the editions to encourage readers to email us with their feedback.

I single out this task to mention because it is easy to overlook it before launch, and find yourself without the right data afterwards.



"You should've looped me in earlier!"

Manage enough projects, and you're guaranteed to have someone tell you (usually in an accusatory tone) that you should've notified or consulted them sooner. This is especially true if events force the project to evolve and you have to bring in someone who would not originally have been involved.

There is a chance that they are right and that you have missed a window of opportunity with them, but even if that's the case, it is too late to do anything about it by the time they say those words to you. More commonly, that response is an initial, defensive reaction to the unexpected. If you hear someone say that to you when you approach them about the project, try not to force them into making a commitment or decision on the spot. Explain the project and what you need from them, leave it with them and let them give you an answer after they've been able to think about it.

When news intervenes

Editorial projects are particularly susceptible to the news forcing a change of plans. This is not a big problem if it forces a delay, but it can cause a lot of problems if you have to fast-track.

The advice here is similar to that given at the end of Chapter 2. Except this time, you should have a much fuller and more detailed picture of the project and the tasks and components it is composed of. Start by referring back to the 'must-haves' and 'nice-to-haves'. Abandon the nice-to-haves first, and gather as a group to decide which of the 'must-haves' might actually be nice-to-haves given the new, tighter timeline.

For example, does the email course need to be six weeks? Or can we launch a version that is only three weeks long? Could each edition be shorter? Could it simply be a series of web articles published over six weeks, instead of an automated email course?

As you pare back and simplify, compare the new scope of the project with the core idea. You may find that you have effectively abandoned the original project. That's OK, but it does mean that you should write out a new version of the core idea and revisit your goals. You don't have to go through the whole project planning process again. The 'quick and dirty' steps at the end of Chapter 2 should suffice.

Once the team acknowledges and agrees that the original project has been abandoned, you should make a clean break with the original project idea. This could be as simple as saying to the team: "OK, let's start over with a blank slate. We only have two weeks now, so I think the main thing we should try to accomplish is this. Let's forget the original email course idea and brainstorm some other things we can do to make that happen in two weeks' time." The reason for doing this is to avoid anchoring your team's creativity around the original (but now outdated) idea, which risks producing something that feels half-complete or inadequate.

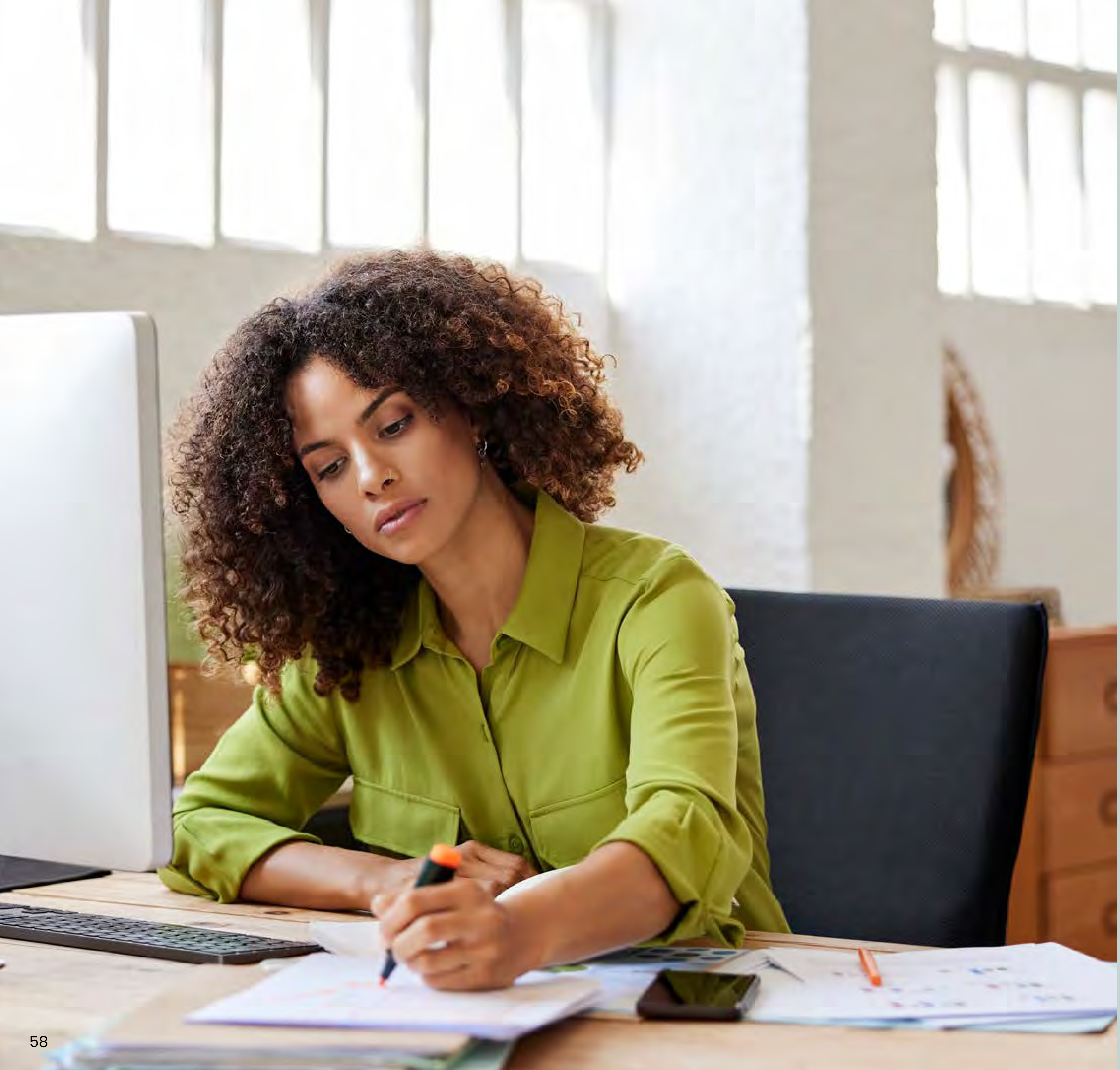
You should also write these developments down in your notes for discussion during the retrospective meeting.

In summary

Project execution is mainly about helping the project team drive towards the milestones that lead to the completion of the project while reacting and adapting to new information and changing circumstances. The main components of work that ensure this goes well are:

- the kick-off meeting, which convenes the team and sets it off in the right direction
- maintaining different channels of communication to serve different purposes such as raising awareness, quick decision-making and keeping stakeholders on board
- referring back to and using the original project plan (especially the core idea) to guide decision-making

The guidance in this chapter should take you all the way through to the project's launch. By encouraging you to document as you go along, it should also have prepared you well for the final chapter, which covers project wrap-up.



Chapter 4:

Project wrap-up

Congratulations! Your project has launched, hopefully to great fanfare. Besides obsessively checking social media to gauge reception, there are a few remaining things to take care of before you move on.

This chapter focuses on thinking beyond the project's immediate completion and providing a sense of closure for the project team.

If you have followed the guide so far, you should have two open documents. The first is a to-do list that includes various tasks, ideas and problems, some of which remain outstanding. You should also have a comprehensive log of the project's progress so far, with meeting minutes, reference materials, and your own notes on what went well and what didn't go well. This will be helpful for the retrospective meeting you will soon host.

Before we get to the retrospective meeting, however, let's look at the remaining 'post-launch' tasks.

Post-launch roadmap

Time to do a bit of clean-up and reorganising on your to-do list. In the hectic final run-up to launch, it's easy to let documentation slip and become disorganised. Also, your perspective on what's important and what isn't may have shifted slightly after reaching that major milestone.

Take everything in your to-do list. Discard all the completed items, then sort the remaining ones into the following three categories:

Immediate tasks

These are core project tasks that everyone agrees should be done within a week to at most a month after the 'go live' date – they just literally couldn't have been completed before launch (for example, promotional and marketing). Technically, the project isn't 'done' until these have also been carried out, but journalists have a deeply ingrained tendency to treat publication date as the final deadline.

Assuming the project team has been working well together so far, you can just follow the same workflow as before to ensure these tasks are carried out. The only difference may be that you might convene a different group of people for your regular 'sync-up' meetings if the work has now shifted to a different set of team members.

In the case of the WSJ Money Challenge, post-launch promotion and audience engagement activities fell into this category. We also scheduled time to review engagement analytics and report them back to the team (more on analytics later in this chapter).

Expansion

These are the tasks and ideas that were relegated to 'nice-to-have' or 'not-in-scope'. Unlike the other two categories, there isn't broad agreement that these should necessarily be done. The reason for reviewing them again is that your view might have changed without the immediate pressure to launch the project. Even if your assessment doesn't change, having an organised list of these is useful for future learning.

Your assumption for the tasks on this list should be that they won't get done by default, but would form a great foundation of ideas for expanding, improving or replicating the project if those opportunities arise.

In the case of the WSJ Money Challenge, these included ideas like bringing the reader back to the wsj.com site for each edition's exercise, creating different 'difficulty levels' for the exercises, and finding ways to extend the relationship with readers who took the course. Some of the ideas we implemented for subsequent email courses, others we left on the shelf.

Maintenance/update

These are similar to the 'immediate tasks' category, except these tasks are scheduled for further out than the immediate aftermath of the project's launch. Ideally, you should be handing these tasks off to an existing team that oversees this area (or, in many other industries, project managers will be able to hand these tasks off to an 'operations manager').

But the reality in most newsrooms is that such a handover will not be possible, and so you should be mentally prepared for the eventuality that it will fall to you as the project manager to keep track of these tasks. Fortunately, managing these is fairly straightforward. Simply set reminders in your calendar to follow up with the relevant people when the time comes.

In the case of the WSJ Money Challenge, these included checking the content every six months to see if any of the editions needed updating, and entering the email course for awards when those submission deadlines came around.

Did you just manage a project, or a product launch?

A project can start to look awfully like an ongoing product if you and the project team are expected to continue to make improvements and otherwise 'maintain' the project simply because you were the team that created it originally.

This transformation usually happens innocuously, through people making a series of sensible suggestions or asking for a stream of seemingly 'small tweaks' after launch. This is also more likely to happen for editorial projects that are designed to be evergreen.

This is not necessarily a bad thing, but it is important to recognise the difference between a project and a product, and the difference in resources and skills needed to manage each.

Maintaining and evolving a product means gathering data through audience feedback, analytics to better understand the user problem and how well the product solves it, and using those insights to iteratively test, optimise and make improvements. If you initially convened the team to work on a project with a clearly defined completion date, don't be surprised if that buy-in does not extend to working on the project/product beyond the initial agreement.

If you think that your project is becoming a product, you need to flag and clearly communicate this to the stakeholders (remember the 'accountable' people in your RACI?). Specifically, you need to reach some understanding on who will hold ongoing responsibility for it, as well as what resources will be needed for the organisation to develop and support this as an ongoing product.

If there isn't the resource or backing to turn the project into a product, then it is important that you use the previously defined scope and to-do list to enforce and communicate the project's completion.

The WSJ Money Challenge – or rather, the idea of creating automated email courses – did become an editorial product that is now overseen by the WSJ's newsletter team, which receives support in managing them from the newsletters and alerts tech product team.

Analytics, or, how did the project do?

After the launch, everyone involved in the project will, reasonably, want to know whether it delivered on its goals and objectives. It is important that you communicate some sense of this before you convene everyone for a retrospective meeting, otherwise you risk having the retrospective meeting be derailed by people wanting to discuss performance instead of process learnings.

If your news organisation has data analysts, you may be able to work with them on project analytics. Otherwise you'll have to look up the numbers, decipher them and communicate the findings by yourself. Either way, here are some tips for how best to approach this.

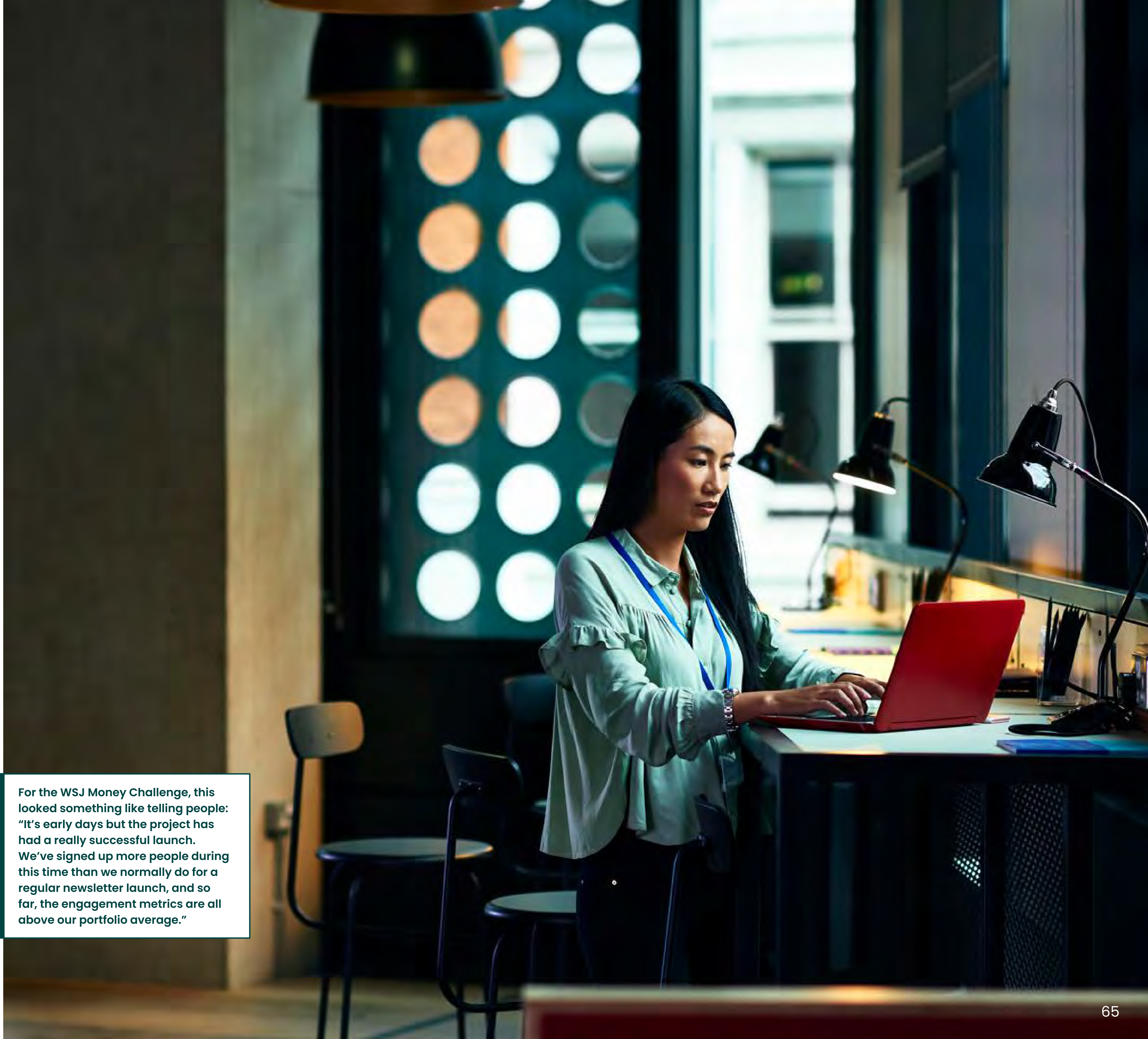
The foundation for the data analytics work should have already been built during the planning phase, when the team collectively set project goals and decided on the project's measure of success. You should also have remembered to put the right tracking or data gathering in place to measure success during the project execution phase.

While this puts you in a good position to gauge how the project performed, there will likely be other questions you or others are curious about. This could include demographic breakdowns (e.g. did people on mobile devices interact with this differently from those on desktops?) or the performance of specific parts of the project. It'll be up to you and the data analysts to decide which questions to prioritise answering.

One issue you may run into is that you may not immediately have enough data to gauge the performance of the project. In that case, you should consider communicating analytics information in two stages. Soon after the project's launch (and before you host the retrospective meeting), issue a quick, preliminary report that does two things: 1) Gives a broad, directional answer to the question: 'Is it doing well?' 2) Helps people place the project's performance in context of something else that they are already familiar with.

This preliminary report will buy you time to gather more data and analyse some of the other questions, so that your subsequent full report can focus on insights.

For the WSJ Money Challenge, this looked something like telling people: "It's early days but the project has had a really successful launch. We've signed up more people during this time than we normally do for a regular newsletter launch, and so far, the engagement metrics are all above our portfolio average."



The retrospective meeting

No matter how well or how poorly the project went, you should always host a retrospective meeting. The meeting is important to provide a sense of closure, to capture process learnings so that future projects can be better managed, and to give project participants a way to see how others involved in the project felt the experience went.

In order to accomplish these goals, the meeting has to be a space where people can speak freely. The discussion should not be dominated by any one group's perspective, or by the most senior person in the room. It should also be a meeting about how the project came together, rather than the output or performance of the project. Keeping those two discussions separate helps prevent the retrospective meeting from devolving into one where people try to assign blame for underperformance (or fight over credit if the project exceeded its goals).

Invite everyone who actively worked on some part of the project, no matter how small. This could result in a large invite list, but the format below should give everyone a chance to have their say while keeping the meeting to 30–45 minutes.

There are different ways to run a retrospective meeting, but this simple template should work for most projects. If some people are participating virtually, you should use an online whiteboard tool like Google Jamboard or Miro. If everyone is participating in person, you should use a physical whiteboard and Post-it notes.

Separate your board into four sections: "What went well", "What went poorly", "What we should do differently next time", and a catch-all section for everything else.

After a short introduction about the agenda and intention of the meeting, ask everyone to write down their thoughts on what went well on (virtual or physical) Post-its. They should write one thought per Post-it, and they can write as many Post-its as they want. They should work in silence. You should set a timer for between three to five minutes. During this time, you, or another facilitator, should move the Post-its around to form clusters identifying common themes.

Once that is done, you should go straight on to repeat the same process for "What went poorly" without discussion (yet). The only difference is that, as people write their Post-its for 'What went poorly', they should also feel free to put Post-its into the remaining two sections. The reason for this is that thinking of what didn't go well often sparks thoughts about how to improve the process for next time or other thoughts, so it's best to capture those as well instead of artificially preventing people from writing those down. You may need to give everyone an extra minute or two for this section as a result.

Finally, as a last step before discussion, ask everyone to write Post-its for the "What we should do differently next time" section, as well as any other thought that doesn't fit into this rubric (those should go into the catch-all section). This part can be a minute or two shorter.

Once all of that is done, use the resulting clusters on the board to facilitate a discussion. If there are relatively few (under 10) attendees, you'll have time to read through each Post-it and invite comments and ask for clarification. If it is a big meeting, you can instead organise the discussion around the big clusters instead of reading each Post-it note.

As you facilitate the discussion, remember the goals of this meeting and try to give each person (or, at least, someone from each team) an opportunity to speak. You'll have to use your judgement to decide when it might be more fruitful to dive into a particular point/cluster, and when you should leave those discussions to a separate meeting. This can be difficult to balance in the moment and, as a project participant yourself, you will inevitably be biased in your choice of discussion topics. But just knowing that, and holding the intention of facilitating an inclusive conversation, already goes a long way. Hopefully, by the end of this discussion you will have some learnings and next steps. Be sure to write them down so that you can send out a summary email afterwards.

It is almost inevitable that some invitees won't be able to make the meeting. You should solicit their feedback separately, through email. Ask them to basically do the same exercise of writing down what went well, what went poorly and what could be done differently by themselves. Collect their responses by email, and incorporate that feedback into the summary email before you send it out.

The wrap deck

The retrospective meeting and the summary email are mainly for the project team itself. In contrast, the wrap deck is a piece of documentation meant for everyone else. Just as you created a project brief document during the planning stage to quickly get someone up to speed on a project, you should also create a wrap deck to give someone a succinct summary of the project and what it accomplished.

The easiest way to think of what this document should contain is to pretend you are presenting the project to a new audience. As such, this document is best done as a presentation deck rather than a Word document. You can draw heavily from the project brief document for the 'What', 'Why' and 'Who', but in addition this should include data analytics on how the project performed, as well as any lessons that emerged from the retrospective meeting.

This is useful for several reasons. One is for knowledge management for the newsroom – if practised diligently, over time your newsroom will accumulate a library of such decks, which builds institutional knowledge and makes it easy for others to refer back to past projects. The second reason, and a strong argument for creating this as a deck, is that it pushes you to think about opportunities to present it to an actual audience. This could be internal (stakeholders, your department, etc), or external (a journalism conference, for example). Talking about the project publicly is a good way to give credit to everyone who worked on it, and makes it more likely that, in the future, people will want to be involved in a project that you manage.

We have presented the lessons learned from the WSJ Money Challenge on multiple occasions, including at the International Journalism Festival and Online News Association Conference and to the International News Media Association. Each time, we have referred back to the wrap deck when preparing for these external presentations.

Sunsetting products

Shutting something down can be an entire project in itself. In which case, treating it as a project and following the advice in this guide should help. But it is also good practice to consider, while the project is fresh in your mind, what would be required to gracefully shut it down should that day come.

This could be a simple document that answers some of the following questions:

- What will need to be archived, and are we currently recording/storing that information?
- Who will need access to that archive and how will they access it?
- Are there any legal requirements for the above?
- What else would be affected if this shuts down?
- Who will need to be informed?
- Where will the person project-managing the shutdown be able to find information about the project?

In summary

If you remember from Chapter 1, projects are defined as "unique, transient endeavours". But they don't occur in a vacuum. The work you put in after a project's launch will let you, and your newsroom, benefit from the project beyond its immediate completion and results. You'll be able to learn from both the things that went well and not so well during the project, and hopefully avoid similar pitfalls (or reuse effective tactics) in the future.

The guidance in this chapter should help you look beyond its initial launch to think about longer-term maintenance, potential expansion, and sunsetting (or closing down) of the project. It should also help you situate the project within the broader context of your news organisation – whether that be building up an institutional base of knowledge, or using the project to deepen relationships and build trust and social capital for future projects.

I hope that this guide has proven helpful in helping you make projects at your newsroom more efficient, less costly, and deliver better results. In addition, I hope that by consistently practising good project management, your newsroom can repeatedly take on increasingly ambitious, teachable, cross-functional work.

I wrote this guide because I believe that creating the capacity to learn and grow as an organisation is the strongest argument for better project management in newsrooms. I hope your newsroom will benefit from this practice as well.

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