

Hello there and welcome back to another episode of the, Your Next Best Step podcast. I am your host Theresa Cantley and I am so excited that you're here with me every week today, learning and finding the lessons and hopefully getting some really good tips on how you can continue to not just grow your business, but also grow within yourself. I wanted to talk today about this topic of work management versus project management, because one of the big things that I do with people, I mean, I talk a lot about processes. And one of the big things that I do with people is, of course, I have a process for handling projects. And when I have taught this and I have some tools that I'm going to talk about as far as helping you with some systems. Because you know, I talk a lot about how you need to align your processes and your systems together.

Because if you don't well, then one or both are useless, but I wanted to talk about this and I'm going to, like I said, I'm going to give you some tools to help you with project management. Because I think that people get project management and work management confused. And I've seen it with people that I work with, my one-on-one clients and I've seen it in just talking with people, friends of mine that are entrepreneurs or that own a small business. And they interchange the two and don't even realize that they're doing it. And they think that they're managing a project, but they're actually not. And I think one of the big, and not that I think, but I believe that one of the big indications or one of the big separations between the two and what really, when you understand this, it can really elevate what you're able to accomplish in your business because project management aligns more with goals and things that you want to accomplish. Work management aligns more with tasks and what you're just looking to get done in a day, just regular tasks.

So I think the one big separation between the two that is something that's really, really important to understand is one has intention and is connected to a vision. The other one is just the day-to-day stuff and there's not, it doesn't have that grand intention and purpose behind it. It's just, as I look at it, going through the motions and getting stuff done during day. And what also separates the two is work management is thinking and acting like an employee, whereas project management is thinking and acting like a leader, a CEO, a visionary. And again, I think people get this mixed up or they think that they're doing project management, but what it really turns out is that they're just managing work.

And I think this comes down to, or I believe this comes down to, with a lot of small business owners we open our business and we have this big dream. And then what we realize is we're just trying to get all the things done during the day and you can grow your business and you can get your business to a certain level. But then you're going to plateau and stall. I mean, that's where a lot of people burn out because when you have that mindset of, I just need to get through the day. I just need to get things done. When you have that mindset, it's a mindset that also believes that I just need to just work harder. I just need to have a to do list that's a mile long. I just need to put in more hours and eventually I will get ahead.

And what happens is we continue to get ourselves buried. We get distracted and there's no intention behind it. But when we can learn with project management and actually have a project that we want to do and figure out how we're going to get it done with our team, or even with our, if you're a one person shop or two people shop how you're going to get it done with your team members. So even me just explaining it, you can see that project management actually has, again, that intention behind it. It has that purpose. It has that goal, whereas work management is indeed exactly what it says. It's just managing work. So I think what happens is, and I've seen it time and time again, is we say, we're going to manage a project. We say, all right, this is the project we're going to launch a new program or we're going to add an additional ... I have a client who opened up during the pandemic, believe it or not, but opened up an additional, it's a restaurant, and they opened up an additional eating space.

And it kind of became like a separate restaurant. All right. So whatever that project is, we look at that and we say, okay. And we start off intention. We start off with, this is our end result. And then what ends up happening ... And people even will sit down with a management team or sit down with a group of employees and say, "Okay, this is what we're looking to achieve. All right, and Mary, you're going to do this. And Steve, you're going to do this. And Joe, you're going to do this. And you have this as your deadline." So even just me explaining it that way you can see all you're doing is saying, this is our goal and this is what you're going to do. In project management, the way that I view it to have projects completed successfully, you have to get people to be a part of whatever that goal is for the project.

They need to understand what the intention is behind what they're doing, but also what purpose they serve. Here's the thing, when you have a project and you're just doling out tasks to people, all you end up doing is managing whether or not they get those tasks done. And I've seen this with people many times over, but when, and the thing is, is that when you do that, all they're trying to do is check a box. They're just trying to check a box and say, I got it done. They don't really have skin in the game and also taking ownership of whatever it is that they need to do and doing it to the highest level that they can do it. Again, when you're just doling out tasks and just managing the work. All they're doing is just, they're just saying, I need to get this done by a certain date. I'm just going to check the box.

But when you get people involved in the thinking and the visioning of a particular project, for example, we'll go back to my client that has the restaurant saying, this is what I would like to create. We need an additional eating space for people, but what I'd like to do because of COVID. And because we need to space people out and have very good socially or physically distanced tables and whatnot. But what I'd like to do is I'd like to add a little spin on this and then get everybody involved in being able to share their ideas. They don't necessarily need to be implemented, but being able to share their ideas so that you can all collectively, I mean, you still have somebody who's managing the project, but you can all collectively say, okay, here is so-and-so's. Mary's strengths are this and Steve's strengths are this. And this is their job role in the business, but they have these individual strengths.

So those are the things that we're going to have them handle, because we know that they can do them well. And then they end up taking ownership of it and perform to their highest level. But again, I've seen it time and time again, where people think that they're doing project management and what they're actually doing is they're just, and we used to always say this when I was in corporate, we used to say, herding cats. They're just managing work. And their employees, and I get this a lot from people, how can I get people to do a better job? How can I get people to do what they really need to do and to really be interested in it?

Well, part of it is make them part of whatever it is that you're planning. And that's the part, I've seen it time and time again with managers where they think that if they involve someone in the process, someone who reports to them, if they involve them in the process, and this person actually has a really good idea, it's going to make them look bad because they didn't come up. The manager didn't come up with the idea. And in essence, it's actually the opposite. When you can get people, when you, as a manager, as a leader, when you can get people to rise to their highest level, their highest ability, that how they are going to thrive and also help you to thrive. They're going to feel like they're part of something, they're going to be inspired. They're going to be motivated no matter what happens.

Even if there are downturns in the business, they're going to be able to be more resilient, to bounce back and say, okay, this isn't working, but why don't we try this? I have this idea. So the key is with project management versus work management is that intention which creates the higher level of ownership in whatever work they're doing. If all you're doing is just ... And I always tell people being a manager isn't just about telling people what to do and dictating like the tasks. It's about helping, having that space, holding that space to guide people and to help them develop their own skills, build more skill

mastery in whatever it is that they do, but also to take that ownership and understand what their bigger purpose is in the business. So, I mean, the question I always ask people is, do you just want to manage tasks?

Do you just want to be a manager of tasks? Or do you want to be a manager of people? Do you want to be a leader of people, not just a manager of tasks, but actually a leader of people that helps to make bigger things happen. So some of the tools that I've used to help in that project management versus work management, and you do need, I mean, there are times when we need work management. I mean, there are times when yes, you will have employees who you literally need to make sure that they're doing what they need to do, and they are doing it well and getting it done so that things can continue to move forward. But when it comes to higher level achieving goals and achieving bigger things in your business, that's where project management comes in.

And understanding that you're not managing tasks, all you're doing is making sure that the goals are moving forward, that the goals are aligned and the projects that are aligned with the vision of the business and that the boat is continuing to stay on course. And when it doesn't, you can course correct. And that's the other thing. People think that when they manage projects that they need to be a micromanager. And that is probably the worst thing and the biggest thing that will kill any project or any goal is being a micromanager. If you need to micromanage people, they might not be in the right role. And maybe they're not a good fit for what you're doing. But some tools, tools that I've helped people to use that have helped them to manage projects in a better way. So let's start with some systems.

So my favorite project management tool that really helps people to connect so that they understand who is doing what and when everybody needs to have stuff done, someone who's managing the project can look at it from a higher level, but then people who are actually doing the work can see kind of how everything fits together. And that tool is Asana. You can get a free version of it. There's also, there's a free trial. And then you can choose between one of their paid versions, depending on how many employees you have. It is a great tool. You can look at things in a list view. You can look at projects in a, they almost look like digital sticky notes, or you can, I think they're called boards. And then you can also look at it as a calendar view to see what's happening with individual projects. But then also you can kind of look at it from, okay, these are all the projects that we have going on and when are all these different things due.

So Asana is one of my favorite tools. I've used it for years. It is super easy to use. I think it has a very short learning curve for people. There're some others that are out there. There's Trello, there's Basecamp, there's Microsoft project. There's a variety of different systems that you can use. But my personal favorite is Asana. The other thing that I like to use instead of email, because a lot of times email will get, it becomes white noise because we have so much stuff coming in our inbox and things can potentially get lost. So the other thing that I like that ties into Asana, the two actually sync together is Slack.

And I like Slack. At first, when I started using Slack, I was like, Oh, this is annoying. But when I started using it with my team, my integrator that I started to work with was really big on it. So I was like, okay, let's try it. So when I started using Slack with my team and I saw the power of it in being able to keep threads of conversations together by project, by topic, however you want to get it set up. It just worked out so great. And as I said, it integrates with Asana, which makes it like super easy for keeping conversations together and just keeping all that information together. So everybody again is communicating. I mean, if you're not live, you're still communicating and you're able to understand what's all happening with the project. So again, if something's not going right, the person who's managing it can course correct and get certain things to happen that maybe aren't happening.

The other thing that I like to use that goes along with this is I prefer Dropbox. Some people like Google Drive, some people like Box. I actually, the trademark lawyer that I work with, he uses Box and I started using it. I thought, Hmm, this is actually a really good tool. But it functions very similar to Dropbox. I've been a Dropbox user for the longest time. I like it. I like the file storage. I like the file structure. Again, it does integrate with Asana and Slack, which is great. And this is how we've created a whole process for a digital workflow. Everybody has access to everything. Everybody knows what's going on. We have real time documents. So if somebody's creating something and somebody else wants to go in and update it or add their comments to it, they can. It's real time.

So it just saves it right away. And there's a working document. Instead of trying to email stuff back and forth, again, that gets lost. Sometimes people can't open files. When you have a digital file storage like a Dropbox or a Box or Google Drive or whatever it is that you want to use. It just makes it so much easier for people to access information very quickly. So those are the three things that I like to use. Going along with that I am a big Zoom user for meetings, getting people to connect virtually because we might not be able to connect live on depending on where everybody is or what's going on. You still have that ability to connect virtually. The other thing going along with this, it's not a system, but it is something that really helps to create that project, get everybody involved, to make sure everybody understands what's going on and really set the stage and really set that intention for whatever the project is, is to sit down and have a good old giant brainstorm.

And my thing that I always like to tell people is, okay, get those big giant pieces of paper that looked like big giant sticky notes, and then start off with, what is the goal of the project, or what is the goal of this thing that you want to accomplish? Who is it for and what is your target? I mean, you can set financial goals, you can set impact goals, numbers of people or whatever, but really understanding why you're doing it and what you're doing. When people understand both of those things, they are much more able to buy into the project, as well as take ownership of whatever their part is in it.

When you're just managing work. That why in the, it's just the what that's there, but the why many times is missing. It's just, you need to do X, Y, Z. Here's the other thing, when you're just managing work, it takes a lot of time. When you're managing people's work, it takes a lot of time and a lot of energy to do this. When you're project managing again, you're just making sure that the project is steering in the right direction. And the key thing is that you have the why, people understand the why and the what behind whatever it is that you're doing. So having a big brainstorm, and again, starting off with why are we doing this? What are we doing? What is the goal? What are the metrics? Who is it for? And then just brainstorm out everything that you can possibly think of, of what you need to do, or what needs to happen to get this project done.

Because then guess what, when you do that good old brainstorm and you can go through and I always tell people, prioritize stuff, group stuff together, because then you can assign somebody or if you're the project manager, you can do it, but you can actually take that and that's what you use to create your project in Asana. You can set up the files in Dropbox and also create whatever you need to create, the channels or the message, the groups, or whatever in Slack and get everything set up ahead of time and then start assigning who needs to do what, and when things are due by. So anyway, I hope this helped you. I know that when it comes to project management, a lot of people, and it's not uncommon, as I said, in small businesses, people just function in chaos. As I like to call it.

They say they have an idea and they're like, okay, let's do that. And then they just start doing the work management mode. So what we want to do in order to free up some time and give everybody that space to be creative is instead to focus more on that intention and project management versus just managing the work. So I hope this helped you. We will put links in the show notes to the different tools that I mentioned in this episode. So if you want to check them out, if you're not using anything right

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now, you'll have the links where you can go in and you can take a look at these tools yourself. Again, these are all tools that I use. I have tried many different ones prior to this. And for me and my team, these are the ones that work best.

So you might want to check out some of the other ones like Trello or Basecamp, or as I said, Microsoft Project. I think you might need to have a Microsoft license to get access to that. But if you do have Microsoft Office to begin with, you probably have access to it. But these are all different tools that you can check out and use to get out of that just managing work and more into managing projects. As I like to call managing ideas or managing dreams. So I hope this helped you. And until next week we have episode 100 coming up soon, very, very soon, where I interview my mentor, Mel Abraham. So I hope you check that out, because it's just, Oh my gosh, it's filled with insights and information and just so much good stuff. So until next this week, have a great rest of your week and stay healthy, be well, and keep following your dreams and the vision that you have to create the business and life that you want. All right. Take care.