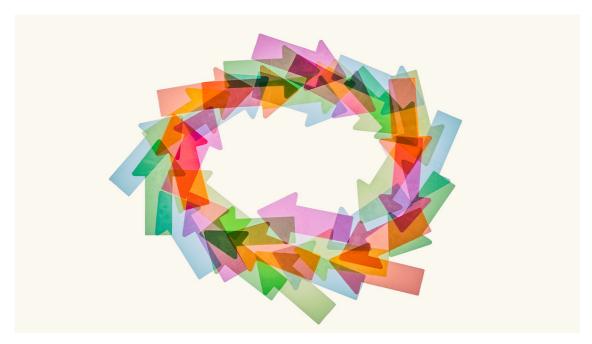Harvard
Business
Review

Project Management

Managing a Project? Formalize Your Follow-Up Process.

by Elizabeth Grace Saunders

October 16, 2023

Jorg Greuel/Getty Images

Summary. One of the biggest mistakes in project management is that simply telling someone to do something is enough for it to get done. In most cases, especially with longer and more complex projects, assigning work isn't enough, explaining work isn't enough, and even planning out work isn't enough. Follow-up is the key to making sure the work actually gets done. Effective follow-up can increase your chances of getting projects completed on time while also decreasing your stress. But you have to do it right. First, accept that follow-up and holding people accountable is essential. Second, clarify your expectations of people. Third,

systematize follow-up by putting it on your calendar or automating reminders. Next, build in margin for missed deadlines. Finally, talk through the results with your team. **close**

> *I can't believe this isn't done! I asked for this to be completed months ago.*
>
> *How is this project so behind? I set out all the milestones clearly.*
>
> *I guess I'm going to have to work late this week to pull everything together because no one did what they were supposed to do. Why bother to delegate if I end up having to do all the work anyway?*

Do any of the above sound familiar? Whether you hold the formal title of Project Manager or are just responsible for managing ad-hoc projects, you've likely faced some of the dilemmas described above.

As a time management coach, I've worked with individuals in both camps. And one of the biggest project management issues they tell me about is thinking that simply *telling* someone to do something is enough for it to get done. In some cases, that can be true — particularly with smaller discrete tasks. But in most, especially with longer and more complex projects, assigning work isn't enough, explaining work isn't enough, and even planning out work isn't enough. Follow-up is the key to making sure the work actually gets done.

Here are some important keys to following up in a way that increases your chances of getting projects completed on time while also decreasing your stress.

Accept that follow-up is essential

Before you can implement any of the following advice, you need to take a look at your mindset toward managing projects. If you believe that people should just be able to get their work done without any follow-up and that it's tedious to hold anyone accountable, you're going to struggle to change. You'll see a reminder to "follow up with Sue" pop up and instead of reaching out to her, you'll ignore it because you feel like you have more important things to get done.

But as I like to say: Reality always wins.

Regardless of whether you like it or not, or think it should be this way, most people prioritize tasks where there is accountability. Items where there's no follow-up may be delayed or not get done at all. The sooner you accept this truth, the easier it will be to prioritize touching base with people.

If you still struggle with this step, consider it another way: While pausing at 2 pm on a Tuesday to email Sue may not be your first choice of activities, staying up until 2 am on a Thursday night to finish what Sue didn't complete is far worse.

Clarify expectations

The next step in successful follow-up is to clearly outline in writing what you expect by what date. For example, let's say that you're having someone check in on the latest updates of a software in development and prepare the presentation deck on its release. If you only tell them the date of the presentation and what needs to be included, they may think that sending you a completed deck the morning of the talk is acceptable. Meanwhile if you expected more involvement in the process, you could be freaking out when you haven't seen anything three days — or even the evening — before the meeting and don't know what's going on.

If you want to have updates on the status of the new software release three weeks in advance, the initial draft of the presentation completed a week prior to the date, and revisions done by two days before so you can get everything properly prepped, you need to say that. Without clear expectations, your team members don't know what you need to feel confident about the process, and you can struggle to know whether or not to check in. You may feel anxiety mounting, but you don't want to micromanage. Intermediate deadlines make it easier to follow up without hesitation.

Systematize follow-up

The less that you need to think about in order to follow up, the more likely it is to get done. There are a variety of ways to make this easier. One is to simply have a shared spreadsheet tracking document where you record the dates for each step of the process. You can have the members of the team be responsible for filling it out, and you can have designated times to review it as recurring events in your calendar, such as once a week or once a day, depending on the project. When review time comes, look at the current status updates. If needed, send a message or reminder asking about any items that are past due.

Another more sophisticated method is to use a project management system where tasks are assigned to individuals and then you can see at a glance which ones are behind and which are on track. A few popular ones include Asana, Monday.com, and Notion. Reminders can be automated with these systems so that you don't need to send them out yourself.

Finally, you could use meetings to follow up. This is the most time-consuming method, but depending on the project's stakes and how much input you feel you need to give along the way, this could be the most effective strategy. It's a lot harder to show up to a meeting empty-handed than it is to ignore an automated

reminder. These meetings could range from meetings specifically scheduled to review the progress on a deliverable to simply including follow-up in your pre-existing one-on-ones or weekly syncs.

The exact system you choose isn't as important as your commitment to following it by having deliverables recorded and ensuring that you touch base at the agreed upon times on the progress.

Build in margin

Even with the best of systems, people will still sometimes miss a deadline. Instead of fighting it, accept it, and build in flexibility into your deadlines. For small things, that might look like asking for something the day before you actually need it. This gives you time during normal business hours to do a brief lookover before submitting the work.

For larger deliverables, you might ask for them to be completed a week or more before the final deadline, so that there's buffer for tasks taking longer than expected. This also gives you the ability to review the work and send it back to the original person to do revisions instead of you having to do all of the changes yourself.

Setting deadlines in advance gives you the ability to follow up prior to the situation turning dire and setting the entire project behind.

Talk through results

If team members do get work done on time and done well, praise them for it! That should never be taken for granted.

However, if there are issues and lots of stress, step back to evaluate the situation:

- Did I lay out clear expectations?
- Did I have a system for following up?
- Did I build in margin?
- Were the expectations realistic given the total workload on this person?

If there's anything you could have improved, admit that to yourself, and if appropriate, talk that through with the others involved. And if you've done your part and the issue really was on the other end, talk that through too.

Consistent follow-up is what makes projects run as smoothly, efficiently, and effectively as possible. By investing a little time up front, you can dramatically decrease your stress and improve your results in the end.

ES

Elizabeth Grace Saunders is a time management coach and the founder of Real Life E Time Coaching & Speaking. She is author of *How to Invest Your Time Like Money* and *Divine Time Management*. Find out more at www.RealLifeE.com.

Recommended For You