



GUEST COLUMN BY SAHIL PARIKH

Sahil Parikh is the founder of Brightpod, a cloud-based project management and time tracking software.

Work Smart! How to scale up projects without drowning in email

At a coffee shop last week, I overheard a team of five talk about their next client pitch and what each of them needed to be working on. Like all services businesses, a company such as theirs was built on a model where revenues are directly related to how many projects the team can work on simultaneously. I heard them complain about how they couldn't keep track of what their teams were working on, and as a growing company it was increasingly frustrating to stay on top of everything. Each day, their inboxes grew exponentially with team discussions, client requests and numerous tasks. Cleaning up their inboxes (deleting spam, responding to people) was almost like being sucked into a black hole that zaps away all productivity.

Just like most companies do, the team at this company was also doing all their planning (scheduling meetings, brainstorming, back and forth on budgets), and delegating via email. Having experienced building project collaboration systems, I politely introduced myself and told them they really needed to think about introducing a project collaboration system within their company, and how much that would help what they did. Of course, they were hesitant. Most people don't like learning new software, and these guys also had the "oh no, not another software to get a hang of" look.

So, I proceeded with caution to tell them about Brightpod, a team collaboration system my company Synage Software developed in 2013, and which is currently helping 1,800 businesses across 85 countries streamline their team workflows.

I had recently read an interesting article about Apple's giant checklist to get their products out the door. A big point the article made was not to rely on "tribal knowledge" that is haphazardly passed from one team member to another. Instead, the article



urged everyone to rely on a process that documents all tasks, checklists and workflows for future teams to follow.

I started a brief discussion on educating them all about how a project management software can help them alleviate the pain of inbox overload.

Smooth communication
Wouldn't you want everyone's feedback, discussions and meeting notes in one place and not in individual inboxes?

Email was built for one-to-one communication and not one-to-many. Email completely breaks down if you are managing more

than a couple of projects with a few people. A smart project management tool will let you assign tasks, setup reminders and even let everyone in your team to add comments so everyone is looped in. Best of all, everything you enter is searchable so you can find a client feedback from early 2012 in a matter of seconds.

Satisfied clients

Wouldn't you want your clients to not flood you with emails?

Keeping your clients updated and letting them review your work is just as important as collaborating with internal teams. Don't finish your project and then involve the client. Instead, make the feedback loop right from the beginning. Add your client to your project management software and let them see your progress. You can even go one step further and let your clients add tasks within their projects. This way, you don't have to deal with getting a ton of email from your client and then copy-pasting the content of the email to your project management software.

Single source of truth

Wouldn't you want to have zero confusion as to when a task is due?

Just like we keep a track of our expenses and go back to it when we need to refer to something, a project management software will let you review assignments by going back in time. I call it the "single source of truth" for every tasks assigned and comment discussed. Protect yourself against "this wasn't included in the plan" or "I didn't know I had to get this across to the client today" scenarios.

Planning

Wouldn't you want to plan better so you can balance work and life?

Success of a project is highly dependent on the planning that goes into it. It is like warming up before a big game. Poor planning may lead to two people doing the exact same thing and losing time. A project management tool is perfect for identifying roles, prioritising tasks and adding dependencies. Make a plan, put it up in your system, follow it and get everyone in-sync.

Work visibility

Wouldn't you want to know who is doing what?

When you plan everything in one system you will know who is doing what and when something is due. As people complete their work or when clients give feedback, everything will be in one place—no more hunting for emails and looking up spreadsheets.

Sharing ideas and docs

Do you want to preserve ideas from the team or lose them in your inbox?

Imagine developing your business strategy and plan for all your clients in a document and then sharing the document as an attachment with all your team members. Nightmare? Instead, use Google Docs, Dropbox or Box to write/store your content and then choose a project management software that can integrate with these tools. This way, you can easily link your content within your projects but still have version control done by the apps that do files sharing the best.

Meet those deadlines

Unlike your inbox, a project management system will let you know when something is due or upcoming.

When working with multiple projects and clients, it is important to have a central place to check deadlines and make sure everything is on track. This can only be possible if you implement a project management software that also has a calendar feature so you can see at a glance which project is lagging behind and which ones

are on schedule.

Protect against attrition

When people come and go, your system will be mightier than the inbox.

Losing a team member can lead to losing valuable information. If he was communicating with a client (via email) about an important deal then what happens to all his communication? It's trapped within his inbox. If all your processes and workflows are in your project management software then everyone has access to everything, even when they are travelling.

Email was built for one-to-one communication and not one-to-many. Email breaks down completely if you are managing more than a couple of projects with a few people.

Follow Parikh on Twitter: @sahilparikh or read his blog at www.sahilparikh.com. His motto: Life is short. Work smart. Have fun.