RfH **Insights webinar**

Project Management for Lean HR Teams

🐦 @LatticeHQ   in @Lattice

Welcome and Intros

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Today's Agenda

1. What is project management and how does it apply to your work

2. How project management can apply across the entire employee lifecycle

3. Project Management Tools

4. Productivity "hacks"

6. Q&A

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Poll Question

How many people make up your HR/People team?

What is Project Management?

Project management (n.) is a critical practice that applies knowledge of process, skills, tools, deliverables, and techniques to project activities to ensure a solid path to project success by meeting goals and requirements.*

*Definition from Team Gantt

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Project Management for HR Teams

from Recruiting to Offboarding

Recruiting + Onboarding

- Tracking your candidate pipeline

- Keeping hiring managers up to date

- Making the offer

- Pre-boarding and onboarding processes

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Performance Management

- Setting up feedback processes and a regular cadence

- Get the whole organization on one tool to formalize performance conversations

- Setting up processes and expectations so there is no bias at play and every employee knows what to expect around compensation

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Offboarding

- Mirroring the onboarding process

- Having a checklist is very important at this stage

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Project Management Tools

Project Management Tools

Josee:

- Calendar
- Notebook
- Spreadsheets
- Zapier
- Asana
- Quip
- Donut

Sarah:

- Asana
- Boomerang for Gmail/Gmail's built-in features
- Calendar
- Spreadsheets

Caitlin:

- ATS
- Trello
- Calendar
- Running doc of tasks to do
- Google Sheets

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Productivity "hacks"

Q&A