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manager.

Jim Boomer • May. 13, 2022



Today, firms juggle increasingly complex projects. They need to evaluate technology decisions, handle recruiting, train and onboard new employees, work through process improvement and client experience initiatives, engage in strategic planning, and mentor and coach team members, to name a few. Partners, IT, and human resources all play a role in these initiatives, but their attention is torn between managing these projects and their day-to-day responsibilities.

Running a modern firm is a team sport. So if you want to increase your capacity and capability to get these projects done successfully, you need to hire a project manager.

Why your firm needs a project manager

How often do you leave conferences, webinars and workshops burning with

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Here's what you need to know about hiring a project manager for your firm.

Responsibilities of a project manager

The exact duties of a project manager will depend on the needs of your firm. Some of the areas we've seen firms have success with a project manager include:

- **Technology.** A project manager can assist your internal or external IT teams with identifying, evaluating, selecting and implementing new technologies and training staff.
- **Human resources.** Project managers can assist with recruiting, screening applicants, interviewing candidates, onboarding and training employees, coaching and mentorship programs and reviews.
- **Financial.** The annual budgeting process is a challenge for many firms because it requires input from several different departments and stakeholders. A project manager can help oversee the process by keeping everyone on task.
- **Strategic planning.** Working on and toward the firm's overall strategic plan and its IT plan includes a lot of tasks, contributors and deadlines. A project manager can help assign responsibilities for action items and ensure deadlines are met.
- **Process improvements.** Process improvement initiatives can fail without effective communication and buy-in from the right people. A project manager can assist with this by assembling a cross-functional team, ensuring communications happen at the right time and to the right people. They can also gather feedback after the initial implementation, which helps with continuous improvement.

The project manager's role isn't to handle all the tasks involved but to oversee complex projects from inception to completion. Once a project is complete, they conduct a post-implementation review to identify lessons learned and what the firm can do to improve the project management process in the future.

Skills of a project manager

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- Negotiation skills to keep involved parties happy and working toward a shared goal
- Scheduling and time management to create well-defined project plans
- Coaching and leadership skills to move projects forward and deliver a positive outcome
- Technical expertise to use project management software and communication tools
- Risk management skills to identify risks at the outset of a project and develop proper mitigation strategies
- Critical thinking and problem solving to navigate tricky or ambiguous projects

The [Project Management Professional](#) (PMP) is an excellent certification program for project management professionals, whether you hire someone who already has the certification or hire someone with the above skills and invest in their development.

Project management tools

Most firms have a workflow solution for tracking tax, assurance, and other client-facing engagements. But what about all the other projects your firm has going on? It's just as essential to have a systematic method for tracking those projects and understanding who is working on what and whether the project is on schedule.

Asana, Trello, Monday, and ClickUp are all excellent options, but there are many others out there, and many offer free base versions if you want to give them a try before you upgrade to a premium plan with all the bells and whistles.

It may seem as though hiring a project manager is an unnecessary expense. However, if you have teams that are not communicating well, budgets going out the window, and missed deadlines on internal projects, it's time to hire a dedicated project manager. The right person will save you time, money and a lot of frustration.

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