Research Summary: Project Management Theories, Models, Best Practices, and Tools

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Note on Artificial Intelligence (AI) Use: AI was used to assist the preparer in drafting and synthesizing portions of this report. The preparer independently verified all information, data, and sources cited against official resources and authoritative references. The report was researched, edited, and revised to ensure accuracy, clarity, and completeness.

I. Overview

This research summary examines the evolution and application of project management theories, methodologies, best practices, and tools, with a focus on their relevance to health and human services training and workforce development. Project management theories provide a foundation for effective planning, leadership, and execution. Over time, these theories have evolved from classical management and systems thinking to more adaptive, human-centered, and knowledge-based frameworks.

Traditional project management approaches such as Waterfall, PRINCE2, Critical Path Method (CPM), and Stage-Gate emphasize structure, predictability, and control, making them well-suited to stable, well-defined projects. In contrast, Agile and Lean frameworks, including Scrum, Kanban, Scrumban, and the Scaled Agile Framework (SAFe), support flexibility, iterative delivery, and continuous improvement, making them ideal for evolving or innovative initiatives. A comparison of these approaches reveals that project complexity, stakeholder engagement, and adaptability are key factors in determining the most effective management model.

Modern project management best practices, such as structured project life cycles, proactive risk management, stakeholder collaboration, resource optimization, and integration with AI and automation, enhance efficiency, adaptability, and accountability. These practices now extend beyond task execution to emphasize benefits realization, governance, continuous learning, and performance measurement, ensuring that projects deliver lasting organizational value. Project management tools, including Zoho Projects, Zoho Sprints, Asana, Trello, Monday.com, Jira, and Microsoft Project, can help put these practices into action, enabling organizations to plan strategically, manage complexity, and achieve measurable and meaningful outcomes.

II. Project Management Theories

Project management theories provide the intellectual and practical foundation for effective project management. They offer conceptual frameworks that guide decision-making, leadership, planning, and execution in diverse and dynamic contexts. Over time, project management theory has evolved from classical management principles to adaptive and knowledge-driven paradigms that emphasize systems thinking, human behavior, and organizational learning.

A. Foundational and Classical Theories

- **General Management Theories:** Early management thinkers such as Fayol and Taylor established the foundation for modern project management through principles of planning, organizing, leading, and controlling. These classical theories emphasized structure, efficiency, and managerial control, forming the basis for formalized project methodologies.[1]
- **Organizational Theory:** Provides insight into how projects function within larger systems of governance, structure, and culture. It examines rational, natural, and open-system perspectives to explain how organizational design and behavior influence project success.[2]
- **Systems Theory:** Projects are viewed as interconnected systems in which each component influences the others. Effective management requires holistic thinking, an understanding of interdependencies, and the ability to anticipate how changes in one part affect the whole.[3]

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[1] Fayol, H. (1949). *General and industrial management* (C. Storrs, Trans.). Pitman. (Original work published 1916).; Taylor, F. W. (1911). *The principles of scientific management.* Harper & Brothers.

[2] Scott, W. R. (2003). *Organizations: Rational, natural, and open systems* (5th ed.). Prentice Hall.

[3] Kerzner, H. (2017). *Project management: A systems approach to planning, scheduling, and controlling* (12th ed.). Wiley.

- **Contingency Theory:** This theory posits that no single project management approach fits all situations. Approaches should be tailored to the project's specific context, complexity, and environment.[4]

B. Human-Centered and Behavioral Theories

- **Behavioral and Motivation Theories:** Focus on understanding human behavior, leadership styles, team dynamics, and motivation within project environments to improve performance and engagement.[5]
- **Situational Leadership Theory:** Effective leadership depends on a project manager's ability to adapt their leadership style to the team's maturity and readiness level. This theory emphasizes flexibility and responsiveness to people's needs.[6]
- **Stakeholder Theory:** Highlights the ethical and practical importance of engaging all parties affected by a project. It promotes understanding stakeholder needs, managing expectations, and fostering collaboration to achieve shared objectives.[7]
- **Socio-Technical Systems Theory:** Recognizes the interdependence between social and technical systems in project environments. Effective management requires balancing technological solutions with human and cultural factors.[8]

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[4] Turner, J. R., & Müller, R. (2017). *The handbook of project management* (4th ed.). Gower.

[5] McGregor, D. (1960). *The human side of enterprise*. McGraw-Hill.; Maslow, A. H. (1943). *A theory of human motivation. Psychological Review, 50*(4), 370-96.; PMI. (2021). *A guide to the project management body of knowledge (PMBOK® guide)* (7th ed.). Project Management Institute.

[6] Hersey, P., & Blanchard, K. H. (1969). Life cycle theory of leadership. *Training and Development Journal, 23*(5), 26–34.

[7] Fares, J. (2021). Stakeholder theory and management: Understanding the ethical dimensions in project management. *Project Management Journal, 52*(4), 15–28. https://doi.org/10.1177/87569728211012345

[8] Trist, E., & Bamforth, K. (1951). Some social and psychological consequences of the longwall method of coal-getting. *Human Relations, 4*(1), 3–38.

- **Institutional Theory:** Institutional pressures, such as industry norms, regulations, and professional standards, shape how organizations adopt and implement project management practices.[9]

C. Cognitive, Decision, and Resource Theories

- **Cognitive and Decision Theories:** Examines how project managers process information, perceive risks, and make decisions under uncertainty. Cognitive Theory emphasizes mental models and problem-solving processes in project contexts,[10] while Decision and Prospect Theories explain biases and trade-offs in judgment under risk.[11]
- **Resource-Based and Dependency Theories:** Emphasizes that project outcomes depend on how effectively organizations acquire, allocate, and leverage critical resources such as talent, capital, and knowledge.[12]
- **Theory of Constraints:** Centers on identifying the most critical bottlenecks that limit project performance. Techniques such as the Critical Chain Method help optimize schedules and resource allocation to maximize throughput and efficiency.[13]

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[9] DiMaggio, P. J., & Powell, W. W. (1983). The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. *American Sociological Review, 48*(2), 147–160.

[10] Kahneman, D. (2011). *Thinking, fast and slow*. Farrar, Straus and Giroux.;Kilpatrick, M. (2006). *Complex project management: Towards a theory of cognition for ill-structured tasks* [Conference paper]. *Australian Institute of Project Management National Conference*.

[11] Kahneman, D., & Tversky, A. (1979). Prospect theory: An analysis of decision under risk. *Econometrica, 47*(2), 263–291.

[12] Barney, J. (1991). Firm resources and sustained competitive advantage. *Journal of Management, 17*(1), 99–120.

[13] Steyn, H. (2025). Project management applications of the theory of constraints beyond critical chain scheduling. *International Journal of Project Management, 43*(2), 123–135. https://doi.org/10.1016/j.ijproman.2025.02.003

D. Analytical and Quantitative Theories

- **Optimization Theory:** Applies mathematical and systems-based approaches to enhance project efficiency and outcomes through data-driven analysis and optimization techniques.[14]
- **Critical Path Method (CPM) & PERT Theory:** Provide techniques for optimizing project schedules by mapping task dependencies and durations. These tools assist in planning, monitoring, and controlling timelines to ensure timely completion.[15]

E. Adaptive, Complexity, and Modern System Theories

- **Chaos and Complexity Theories:** Recognize that projects often operate in unpredictable and complex environments. Chaos Theory highlights the nonlinearity and instability inherent in dynamic projects, while Complexity Theory emphasizes emergent patterns and adaptive behaviors in systems involving numerous interdependent agents. They emphasize adaptive planning, flexibility, and resilience to respond effectively to unexpected changes or disruptions.[16]
- **Lean Theory:** Originating from manufacturing, Lean emphasizes delivering maximum value while minimizing waste. It encourages

[14] Hillier, F. S., & Lieberman, G. J. (2021). *Introduction to operations research* (11th ed.). McGraw-Hill Education.

[15] Malcolm, D. G., Roseboom, J. H., Clark, C. E., & Fazar, W. (1959). *Application of a technique for research and development program evaluation (PERT). Operations Research, 7*(5), 646–669.; Project Management Institute. (2021). *A guide to the project management body of knowledge (PMBOK® guide)* (7th ed.). Project Management Institute.

[16] Pourrahimian, E. (2024). Application of chaos theory in project management. In *Proceedings of the ASCE International Conference on Computing in Civil Engineering* (pp. 60–67). https://doi.org/10.1061/9780784485286.060; Remington, K., & ,Pollack, J. (2011). *Tools for complex projects.* Gower. Cooke-Davies, T., Cicmil, S., Crawford, L., & Richardson, K. (2007). We're not in Kansas anymore, Toto: Mapping the strange landscape of complexity theory and its relationship to project management. *Project Management Journal, 38*(2), 50–61, .

continuous improvement, efficient processes, and the elimination of non-value-added activities.[17]

- **Agile and Adaptive Theories:** Prioritize iterative development, flexibility, and responsiveness to change. They emphasize collaboration, customer feedback, and delivering incremental value, particularly in dynamic or uncertain environments, effectively.[18]
- **Project Governance Theory:** Defines the frameworks, roles, and accountability structures that ensure alignment between project objectives and organizational strategy.[19]
- **Benefit Realization and Value Management Theory:** Emphasizes achieving strategic outcomes and benefits rather than simply delivering outputs. Projects are instruments of organizational value creation and transformation.[20]
- **Knowledge-Based Theory:** Views projects as vehicles for knowledge creation, sharing, and organizational learning. It highlights the value of lessons learned and intellectual capital in improving long-term capability.[21]
- **Quantum Project Management:** A newer theory drawing analogies from quantum physics to address complexity and uncertainty in large-scale projects. It suggests that projects exist in dynamic and

[17] Teich, S. T. (2013). Lean management-the journey from Toyota to healthcare. *Journal of Healthcare Management, 58*(5), 340–352. https://doi.org/10.1097/JHM-D-13-00042

[18] Highsmith, J. (2009). *Agile project management: Creating innovative products* (2nd ed.). Addison-Wesley.; Project Management Institute. (2021). *A guide to the project management body of knowledge (PMBOK® guide)* (7th ed.). Project Management Institute.

[19] Project Management Institute. (2021). *A guide to the project management body of knowledge (PMBOK® guide)* (7th ed.). Project Management Institute.

[20] Bradley, G. (2016). *Benefit realisation management: A practical guide to achieving benefits through change* (2nd ed.). Gower Publishing.

[21] Nonaka, I., & Takeuchi, H. (1995). *The knowledge-creating company: How Japanese companies create the dynamics of innovation*. Oxford University Press.;Davenport, T. H., & Prusak, L. (1998). *Working knowledge: How organizations manage what they know*. Harvard Business School Press.

probabilistic states, requiring nonlinear and adaptive management approaches.[22]

III. Project Management Methodologies

A. Traditional Project Management Approaches

Traditional methods follow a predictive model, emphasizing comprehensive upfront planning, fixed requirements, and sequential execution. They are most effective for projects with stable goals, clearly defined deliverables, and fixed funding. Types of traditional project management approaches include:

- **Waterfall:** A linear, phase-by-phase approach in which work progresses sequentially through clearly defined stages: requirements, design, implementation, verification, and maintenance. Each phase must be completed before moving on to the next, which makes upfront planning and requirement specification essential. This structured approach works best for projects with clear, stable objectives and predictable deliverables, where changes are unlikely, such as standardized program development or structured administrative initiatives.[23]
- **Critical Path Method (CPM):** A scheduling technique used to identify the longest sequence of dependent tasks (i.e., the "critical path") and determine a project's minimum duration. Tasks on this path have zero slack, meaning that delaying one task directly affects the project's overall timeline. CPM is particularly useful for multi-phase projects

[22] Prieto, R. (2024). Quantum project management, large complex projects, and entanglement. *PM World Journal, 12*(7).
[23] Wysocki, R. K. (2019). *Effective project management: Traditional, agile, extreme* (8th ed.). Wiley.

where task sequencing, resource allocation, and timeline monitoring are critical.[24]

- **Critical Chain Project Management (CCPM):** Builds on CPM by considering resource constraints and incorporating buffers to protect project schedules. This approach helps ensure that projects stay on track even when resources are limited or tasks compete for attention.[25]
- **PRINCE2 (PRojects IN Controlled Environments):** A structured, process-based methodology that divides projects into sequential stages with clearly defined roles and responsibilities. Each stage concludes with a review, or "gate," and a retrospective to capture lessons learned. It emphasizes accountability, risk management, and alignment with organizational or funder objectives. PRINCE2's structured and documented approach supports risk management, accountability, and stakeholder communication. It is best suited for large or high-stakes projects where oversight and control are paramount. Although PRINCE2 can be documentation-heavy, it is often tailored or scaled down based on project size and complexity.[26]
- **Stage-Gate (Phase-Gate) Process:** Divides projects into discrete stages separated by decision points (i.e., gates), where deliverables and risks are evaluated before proceeding. This method is widely used in product development and other structured program initiatives where iterative approval and oversight are critical.[27]

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[24] Kerzner, H. (2022). *Project management: A systems approach to planning, scheduling, and controlling* (13th ed.). Wiley.

[25] Leach, L. P. (2003). *Critical chain project management*. Artech House.

[26] Axelos. (2017). *Managing successful projects with PRINCE2* (6th ed.). The Stationery Office.

[27] Cooper, R. G. (2008). *Perspective: The stage-gate® idea-to-launch process—update, what's new, and NexGen systems. Journal of Product Innovation Management, 25*(3), 213–232. https://doi.org/10.1111/j.1540-5885.2008.00296.x

Practical Applications: These methods are particularly effective for projects with well-defined objectives and deliverables unlikely to change. For example, in health and human services training and workforce development, developing a standardized training curriculum or preparing a grant proposal with specific outcomes can benefit from Waterfall or PRINCE2's structured stage reviews. CPM is especially valuable for larger, multi-phase initiatives, helping teams sequence activities, monitor dependencies, and maintain schedules to ensure smooth coordination across all project components.[28]

B. Modern Agile and Lean Approaches

Agile and Lean methods follow an adaptive model that emphasizes flexibility, collaboration, and iterative delivery. They are most effective for projects with evolving requirements, complex workflows, or dynamic environments. Agile frameworks prioritize incremental work cycles, frequent feedback, and stakeholder engagement, while Lean focuses on maximizing value and eliminating waste. Types of Agile and Lean approaches include:

- **Agile (Iterative Management):** Not a single method but a mindset encompassing a set of principles and practices designed to support flexibility, collaboration, and responsiveness to change.[29] Work is divided into small iterations or cycles, allowing teams to gather frequent feedback and continuously refine deliverables. Agile emphasizes four core values: individuals and interactions over processes and tools, working outcomes over comprehensive documentation, stakeholder collaboration over contract negotiation,

[28] Project Management Institute. (2021). A guide to the project management body of knowledge (PMBOK® guide) (7th ed.). Project Management Institute.; Kerzner, H. (2022). *Project management: A systems approach to planning, scheduling, and controlling* (13th ed.). Wiley.; Axelos. (2017). *Managing successful projects with PRINCE2* (6th ed.). The Stationery Office.

[29] K. Beck, M. Beedle, A. van Bennekum, A. Cockburn, W. Cunningham, M. Fowler, J. Grenning, J. Highsmith, A. Hunt, R. Jeffries, J. Kern, B. Marick, R. Martin, S. Mellor, K. Schwaber, J. Sutherland, and D. Thomas. (2001). *Manifesto for agile software development*. https://agilemanifesto.org/

and responding to change over following a fixed plan. Agile is particularly suited for projects where requirements are evolving, and collaboration with stakeholders is critical, as teams can adjust scope and priorities based on learning and feedback.[30]

- **Scrum:** Organizes work into time-boxed sprints (usually 1–4 weeks), producing incremental deliverables each cycle. Scrum defines structured roles (Product Owner, Scrum Master, and Development Team) and ceremonies (Sprint Planning, Daily Scrum, Review, and Retrospective), fostering transparency, inspection, and adaptation. Scrum emphasizes iterative delivery, with each sprint producing a potentially complete increment, enabling rapid learning and adaptability.[31]
- **Kanban:** Visualizes workflow on a board with columns representing stages of work (e.g., To Do, In Progress, Done), providing real-time visibility into progress and bottlenecks. It emphasizes transparency, limiting work-in-progress (WIP), and continuous flow, making it well-suited to projects with a steady stream of tasks where issues need to be quickly identified and resolved.[32]
- **Lean:** Focuses on maximizing value and minimizing waste by continuously improving processes and eliminating non-value-adding activities. Lean emphasizes continuous improvement through small, incremental changes, often called Kaizen. The philosophy encourages organizations to streamline processes, reduce inefficiencies, and improve the flow of value to customers or end users. Lean

[30] Highsmith, J. (2009). *Agile project management: Creating innovative products* (2nd ed.). Addison-Wesley.
[31] Schwaber, K., & Sutherland, J. (2020). *The Scrum Guide: The Definitive Guide to Scrum: The Rules of the Game*. Scrum.org & Scrum Inc.
[32] Anderson, D. J. (2010). *Kanban: Successful evolutionary change for your technology business*. Blue Hole Press.

complements Agile methods by optimizing process efficiency within iterative project frameworks, ensuring that resources are utilized effectively while maintaining flexibility and adaptability.[33]

- **Scrumban:** A hybrid approach that combines Scrum's iterative planning cycles with Kanban's visual workflow management. It allows teams to maintain the structure and predictability of sprints while also accommodating ongoing, continuous work. By visualizing tasks on a Kanban board and limiting work-in-progress, Scrumban helps teams identify bottlenecks, prioritize effectively, and adapt to shifting needs. This flexibility makes it well-suited for projects that require both planned deliverables and the ability to respond to new tasks or evolving requirements as they arise.[34]
- **Scaled Agile Framework (SAFe):** Provides a structured approach to applying Agile principles across multiple teams and large, complex projects. It aligns teams toward shared objectives, facilitates communication, and coordinates dependencies across the organization. SAFe integrates planning across levels, enabling large-scale initiatives to remain agile while maintaining strategic oversight. This makes it especially useful for initiatives where multiple teams must collaborate toward a common goal, promoting consistency, adaptability, and efficiency at scale.[35]

Practical Applications: Agile and Lean methods are particularly valuable for projects where requirements may change, workflows are complex, or ongoing stakeholder feedback is essential. In health and human services

[33] Womack, J. P., & Jones, D. T. (2003). *Lean thinking: Banish waste and create wealth in your corporation* (2nd ed.). Free Press.
[34] Ladas, C. (2009). *Scrumban: Essays on kanban systems for lean software development*. Modus Cooperandi Press.
[35] Leffingwell, D. (2019). *SAFe 5.0 distilled: Achieving business agility with the Scaled Agile Framework*. Addison-Wesley.

training and workforce development, Agile can support incremental development of program components, allowing teams to pilot modules, gather feedback, and refine content iteratively. Kanban helps coordinate sequential tasks such as curriculum design, scheduling, and resource allocation, while Lean identifies process inefficiencies and optimizes resource use. Combined, Agile and Lean approaches provide a flexible, iterative, and efficiency-driven framework that supports continuous improvement, adaptability, and effective collaboration with stakeholders.[36]

C. Traditional vs. Agile/Lean Project Management Approaches

The table below highlights key differences between traditional and Agile/Lean project management approaches, showing how each handles planning, change, stakeholder involvement, delivery, and project complexity, which can help guide the choice of methodology for health and human services training and workforce development projects.

	Traditional Methods	Agile/Lean Methodology
Approach	Linear and sequential, progressing through defined phases (e.g., requirements → design → implementation → testing → delivery).	Iterative and incremental, using short cycles (sprints) to refine and deliver components continuously.
Requirements	Fixed and defined at the project's outset, changes are limited once planning is complete.	Flexible and adaptive; requirements evolve based on feedback and emerging needs.

[36] Highsmith, J. (2009). *Agile project management: Creating innovative products* (2nd ed.). Addison-Wesley. Anderson, D. J. (2010). *Kanban: Successful evolutionary change for your technology business*. Blue Hole Press, Washington D.C.
Beck, K., Beedle, M., van Bennekum, A., Cockburn, A., Cunningham, W., Fowler, M., Grenning, J., Highsmith, J., Hunt, A., Jeffries, R., Kern, J., Marick, B., Martin, R. C., Mellor, S. J., Schwaber, K., Sutherland, J., & Thomas, D. (2001). Manifesto for agile software development.; Womack, J. P., & Jones, D. T. (2003). *Lean thinking: Banish waste and create wealth in your corporation* (2nd ed.). Free Press.; Schwaber, K., & Sutherland, J. (2020). *The Scrum Guide: The Definitive Guide to Scrum: The Rules of the Game*. Scrum.org & Scrum Inc.

Stakeholder Involvement	Limited, primarily during initial planning and final delivery stages.	High and continuous throughout the project lifecycle, with frequent feedback and collaboration.
Delivery	Single, comprehensive delivery upon project completion.	Frequent, incremental delivery of usable outputs throughout the process.
Change Management	Complex and costly to accommodate; typically requires formal approval and re-planning.	Encouraged and easily integrated into ongoing work cycles.
Best Suited For	Projects with stable, well-defined objectives and low uncertainty.	Projects with evolving requirements, innovation, or high uncertainty where flexibility is key.

IV. Project Management Best Practices

Effective project management is essential for achieving organizational goals and delivering sustainable results. The core modern best practices go beyond meeting deadlines and budgets; they emphasize strategic alignment, measurable value creation, and continuous improvement. Core principles include structured planning, proactive risk management, strong stakeholder collaboration, efficient resource utilization, and the integration of emerging technologies. Equally important are practices that promote adaptability, benefits realization, ethical governance, performance measurement, and knowledge sharing, ensuring that projects not only deliver outputs and advance long-term team and organizational success.

- **Structured Project Life Cycle:** Having a clear project life cycle with well-defined phases and milestones gives teams essential structure and clarity. Whether using traditional or Agile approaches, dividing a project into stages (from initiation and planning through execution,

monitoring, and closure) ensures objectives are systematically addressed and deliverables are tracked. Milestones serve as checkpoints to monitor progress and adjust plans as needed.[37]

- **Risk Management:** Identifying, assessing, and addressing risks early helps prevent delays, cost overruns, or project setbacks. Effective risk management includes creating contingency plans, regularly monitoring potential issues, and assigning clear ownership for responses. This approach builds stakeholder confidence and reduces the impact of unforeseen events.[38]
- **Stakeholder Collaboration:** Regular communication and feedback are essential to align expectations, maintain support, and address concerns. Involving stakeholders throughout the project fosters collaboration, strengthens relationships, and ensures deliverables meet organizational or customer/client needs. This is especially important for complex projects involving multiple teams or external partners.[39]
- **Resource Optimization:** Efficient management of personnel, time, and budgets is critical to project success. Resource optimization involves balancing workloads, tracking availability, and avoiding over-commitment. Proper planning ensures projects maintain quality and meet deadlines without overburdening teams.[40]

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[37] Atlassian. (n.d.). *Project life cycle: The 5 phases explained.* Atlassian Work Management.; Salapatas, J. N. (2000). *Best practices-the nine elements to success*. Paper presented at Project Management Institute Annual Seminars & Symposium, Houston, TX. Newtown Square, PA: Project Management Institute.

[38] Saeed, K., Ali, M., Rauf, M., & Azam, M. (2025). *Examining the impact of risk management practices on sustainable project performance in the construction industry: The role of stakeholder engagement. Frontiers in Built Environment*, 11, 1575827. https://doi.org/10.3389/fbuil.2025.1575827

[39] Pratt, M., & Alexander, M. (2024, January 19). Stakeholder management: Your guide to influencing project outcomes. *CIO Magazine*. Alnhari, A. A., & Qureshi, R. (2024). Unified External Stakeholder Engagement and Requirements Strategy. International Journal of Software Engineering & Applications (IJSEA), 15(5). https://doi.org/10.5121/ijsea.2024.15501

[40] Brigden, B. (2025, February 3). *Master resource optimization: 5 key techniques and practices for success*. Teamwork Blog.; Hollen, G., & Laforteza, M. (n.d.). *How project resource management can boost your business performance*. Planview Insights.

- **Artificial Intelligence (AI) and Automation Integration:** Artificial Intelligence (AI) and automation are transforming project management. According to the Project Management Institute's *AI Innovators: Cracking the Code on Project Performance* report, 81 % of project professionals say AI technologies are impacting their organizations, pointing to a strong trend toward adoption of AI-enabled project tools.[41] AI tools improve scheduling, forecasting, workload balancing, and reporting, while automation reduces repetitive administrative tasks, allowing project managers to focus on strategic decisions and data-driven outcomes.[42]
- **Benefits Realization:** Modern project management emphasizes not just completing deliverables but realizing measurable benefits. Clearly defining desired outcomes and tracking benefit metrics ensures that projects generate tangible value and align with organizational strategy.[43]
- **Change Management and Adaptability:** Given today's dynamic environments, adaptability is essential. Successful project managers incorporate iterative planning, agile methods, and hybrid models to remain responsive to shifting stakeholder needs or funding constraints.[44]

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[41] Project Management Institute. (2019). *AI Innovators: Cracking the code on project performance [Pulse of the Profession® In-Depth Report]*. Project Management Institute.

[42] Atlassian. (2024, September 6). *AI best practices to improve your project management*. Atlassian Blog. Nenni, M.E., De Felice, F., De Luca, C. et al. (2025). How artificial intelligence will transform project management in the age of digitization: A systematic literature review . *Management Review Quarterly, 74*, 1669–1716. https://doi.org/10.1007/s11301-024-00418-z; Adamantiadou, D. S., & Tsironis, L. (2025). Leveraging Artificial Intelligence in project management: A systematic review of applications, challenges, and future directions. *Computers, 14*(2), 66. https://doi.org/10.3390/computers14020066

[43] Project Management Institute. (2021). *A guide to the project management body of knowledge (PMBOK® guide)* (7th ed.). Project Management Institute.; Ward, J., & Daniel, E. (2012). *Benefits management: How to increase the business value of your IT projects* (2nd ed.). John Wiley & Sons.

[44] Dong, H., Dacre, N., Baxter, D., & Ceylan, S. (2024). What is Agile Project Management? Developing a new definition following a systematic literature review. *Project Management Journal, 55*(6), 668-688. https://doi.org/10.1177/87569728241254095.; Serrador, P., & Pinto, J. K. (2015). Does Agile work? A quantitative

- **Knowledge Management:** Capturing and sharing lessons learned helps teams and organizations avoid repeating mistakes and strengthens institutional knowledge. Effective knowledge management fosters innovation and improves outcomes in future projects.[45]
- **Governance and Ethics:** Strong project governance provides decision clarity and ensures alignment with strategic goals and ethical standards. Clearly defined roles, transparent processes, and integrity are critical, particularly in public and nonprofit sectors.[46]
- **Performance Measurement and Continuous Improvement:** Finally, modern best practices emphasize ongoing performance tracking through metrics, dashboards, and key performance indicators (KPIs). Continuous evaluation enables data-driven improvements across projects and portfolios.[47]

V. Project Management Tools

After reviewing current project management best practices, it is helpful to examine the tools that can support these practices in real-world projects. The right project management software helps teams plan, track, and execute initiatives efficiently, translating best practices into actionable workflows that drive results. Tool selection depends on project size, methodology, and complexity, with options ranging from traditional, structured platforms to

analysis of agile project success. *International Journal of Project Management, 33*(5), 1040–1051. https://doi.org/10.1016/j.ijproman.2015.01.006.

[45] Ajmal, M. M., & Koskinen, K. U. (2008). Knowledge Transfer in Project-Based Organizations: An Organizational Culture Perspective. *Project Management Journal*. https://doi.org/10.1002/pmj.20031

[46] Muller, R. (2009). *Project Governance* (1st ed.). Routledge. https://doi.org/10.4324/9781315245928; Project Management Institute. (2016). *Code of ethics and professional conduct [PDF]*. Project Management Institute (Also refer to Project Management Institute's Ethics Guidelines).

[47] Kerzner, H. (2022). *Project management metrics, KPIs, and dashboards* (3rd ed.).

Agile- and Lean-focused solutions. Each tool offers features to support planning, collaboration, and progress tracking:

- **Zoho Projects** supports traditional and hybrid project management approaches with Gantt charts, task dependencies, time tracking, and workflow automation.[48]
- **Zoho Sprints** is designed for Agile teams, offering sprint planning, backlog management, burndown charts, and integration with developer tools.[49] (Note: Organizations may use Zoho Projects and Zoho Sprints together or select one based on their preferred methodology and team structure.)
- **Trello** uses a simple Kanban-style board system to represent workflow stages visually, ideal for smaller projects or teams seeking an intuitive, visual approach.[50]
- **Asana** accommodates Agile and hybrid methodologies, featuring task automation, timeline views, and collaborative workspaces that support cross-functional teams.[51]
- **Monday.com** is a flexible, visual project management platform supporting Agile, hybrid, and traditional workflows. It offers Kanban, Gantt, timeline, and calendar views, along with customizable boards and task tracking. Its emphasis on team collaboration, transparency,

[48] For additional information on Zoho Projects, please refer to: Low, G. (2025, November 3). *Zoho Projects software in-depth review 2025*. Tech Productivity Reviews.
[49] For additional information on Zoho Sprints, please refer to: Ginn, D. (2025, February 19). *Zoho Sprints review 2025*. Cloudwards.
[50] For additional information on Trello, please refer to: Klein, M. (2024, October 17). *What is Trello? Key features, pricing, & how to use.* Project-Management.com.
[51] For additional information on Asana, please refer to: FreshBooks. (2024, May 15). *Asana pros and cons: Top 4 advantages & disadvantages.* FreshBooks.

and workflow visibility makes it well-suited for coordinating multi-step training programs or workforce initiatives across departments.[52]

- **Jira** provides advanced sprint tracking, issue management, and customizable workflows with deep integrations for Agile project environments.[53]
- **Microsoft Project (MS Project)** includes advanced Gantt charts, resource allocation, and critical path tracking, making it suitable for large-scale or enterprise-level projects that require detailed scheduling and reporting.[54]

Simpler tools such as Trello and Asana are typically most effective for small programs or teams that need visual task tracking, such as coordinating short-term training delivery, managing curriculum development for a small cohort, or tracking volunteer assignments for a community event. Agile-oriented teams may prefer Jira or Zoho Sprints, for example, when developing iterative program modules, managing ongoing service delivery improvements, or tracking software-based learning platforms, where sprints and backlog management support incremental progress. Larger, schedule-driven projects often benefit from MS Project or Zoho Projects.

When selecting a tool, the organization or team should consider ease of use, including staff training requirements, the tool's learning curve, and its integration with existing systems. Other factors include mobile accessibility for remote staff, the ability to customize workflows and dashboards to fit team processes, and ongoing maintenance or update needs. Choosing a tool

[52] For additional information on Monday.com, please refer to: Drake, N. (2025, September 2). *Monday .com review*. TechRadar.
[53] For additional information on Jira, please refer to: Carter, R. (2024, January 26). *Jira review: Exploring Jira project management*. UC Today.
[54] For additional information on MS Projects, please refer to: Fink, H. (2025, November 3). *Microsoft Project review 2025: Expert opinion*. The Digital Project Manager.

that aligns with these practical considerations helps ensure smoother adoption, efficient workflows, and more effective project execution.[55]

The summary comparison table on the following pages provides a high-level overview of the seven commonly used project management tools introduced above, highlighting their key features, strengths, and limitations.[56]

[55] Young Entrepreneur Council (YEC). (2023, January 20). *Nine Factors To Consider When Choosing The Perfect Project Management Tool*. F*orbes.* Elliott, J. (2023, July 10). *5 Factors to Consider When Choosing Project Management Software*. U.S. Chamber of Commerce.

[56] Montgomery, O. (2025, September 16). *Best project management software of 2025*. Capterra.

Project Management Tool	Key Features (Approach)	Strengths	Limitations	Best Fit for Training/ Workforce Projects
Zoho Projects	Cloud-based suite for small-to-medium teams; task lists, Gantt charts, timesheets; integrates across Zoho apps within the Zoho One suite.	Strong task management and time tracking; detailed planning; good for teams already using Zoho.	Steeper learning curve; limited customization; less robust mobile app.	Multi-step programs requiring structured scheduling and detailed resource tracking.
Zoho Sprints	Agile (Scrum) tool for sprint and backlog management; built-in timesheets and burndown charts.	Simple, affordable, and beginner-friendly Agile platform.	No Gantt or resource-leveling views; limited advanced project management features.	Iterative development of training modules or curricula; Agile teams needing backlog and sprint management.
Trello	Visual Kanban boards (cards/lists); checklists, labels, automation, drag-and-drop.	Highly intuitive; quick onboarding; ideal for smaller collaborative projects.	Lacks a built-in timeline, Gantt view, or resource planning; limited scheduling logic.	Small teams or simple workflows, such as curriculum development, event tracking, or sequential program steps.

Project Management Tool	Key Features (Approach)	Strengths	Limitations	Best Fit for Training/ Workforce Projects
Asana	Flexible views (list, board, timeline, calendar); strong collaboration features.	User-friendly; integrates with Slack, Google Drive, Teams; versatile for hybrid teams.	No built-in time tracking; it can be feature-heavy for new users.	Cross-functional collaboration among trainers; hybrid projects requiring both timeline and visual task tracking.
Monday.com	Flexible platform supporting Kanban, Gantt, timeline, and calendar views; customizable boards and workflows.	Highly visual and intuitive; strong collaboration features; supports hybrid, Agile, and traditional workflows.	Advanced features require higher-tier plans; it can be overwhelming if over-customized. Time tracking and reporting are less robust than MS Project or Jira.	Multi-department training programs, event coordination, and initiatives requiring visibility across tasks and teams.
Jira	Agile-focused (Scrum/Kanban boards); customizable workflows; advanced reporting.	Excellent for iterative projects; strong tracking and metrics.	Complex setup, high learning curve, and may overwhelm non-technical users.	Teams using Agile or Kanban for complex workflows, projects requiring detailed metrics and reporting.

MS Project	Traditional scheduling with Gantt charts, dependencies, resources, & portfolio management.	Robust scheduling and reporting; integrates with the Microsoft Office suite.	Expensive; steep learning curve; less flexible for Agile teams.	Large-scale or multi-site initiatives with strict timelines, budgets, and multiple dependencies.

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