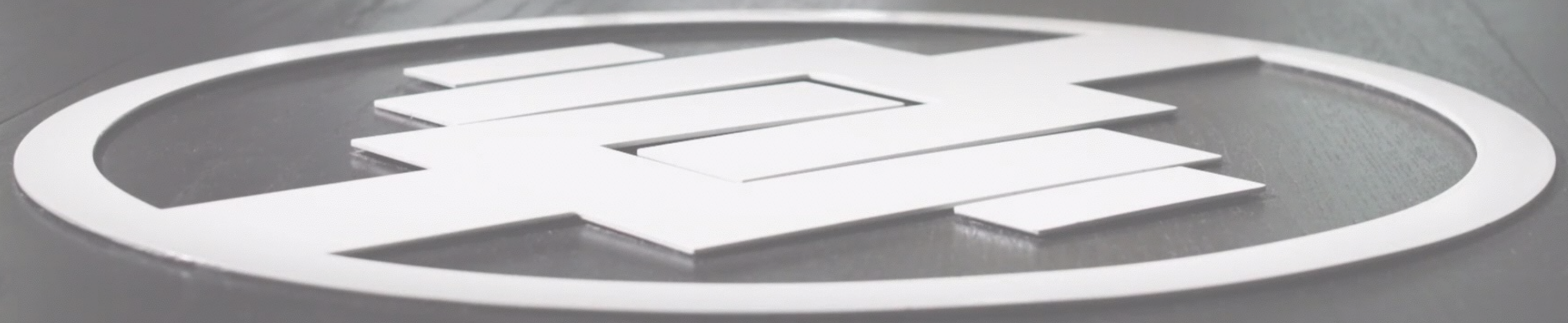# LINCHPIN

LINCHPIN

EVERYONE IS A PROJECT MANAGER, YOU CAN TOO!

ABOUT ME

Senior Client Coordinator

Certified Project Manager (PMI)
I herd Cats, Professionally
15 Years in Customer Service
10 Years in Project Management in the Digital Space

WHY THIS TALK?

1. Because I said so…

2. Everyone is a Project Manager

3. Everyone can create a process

4. Everyone can use free tools

5. Everyone can improve on what they already do

IN A GALAXY FAR, FAR AWAY...

An organization would have Project Management Office (PMO) and they would have a Project Portfolio that would outline all the short term (1yr) and long term project initiatives for an organization. Once a project is green lit the PMO would create a Project Charter. The Project Charter defines the who, what, when, where, why, and how of the Project and requires formal sign-off by the Key Stakeholder(s). When the Project Charter gets signed, a Project Manager is assigned to run the Project from an extensive bull-pen of eager Project Managers just waiting for something to do...

KNOWING IS HALF THE BATTLE (THE OTHER IS CHOCOLATE)

- What is a Project?
  - A project is any activity or group of activities that has a definitive start and end & produces a unique product/result.
    - Building a shed, Knitting a scarf, Redesigning a website
  - It is <u>not</u> ongoing or daily operations.
  - Everyday Homer Simpson pushes a button, forever and ever, not a project!
  - Projects are also iterative, they are not static they constantly change and move (hopefully forward).
- What are Stakeholders?
  - Pretty much everyone who has a stake or is effected by the project. Key Stakeholders are the decision makers.
- What is Project Management?
  - Project Management is the process and activity of planning, organizing, motivating, and controlling resources, procedures and protocols to achieve specific goals in scientific or daily problems.
  - The application of knowledge, skills and techniques to execute projects effectively and efficiently. It's a strategic competency for organizations, enabling them to tie project results to business goals — and thus, better compete in their markets.
- What is PMI? The Project Management Institute, AKA The Death Star

THE PMI PROCESS: 5 PHASES

1. Initiating

2. Planning

3. Executing

4. Monitoring & Controlling

5. Closing

THE PMI PROCESS: 10 KNOWLEDGE AREAS

1. Integration

2. Scope

3. Time

4. Cost

5. Quality

6. Human Resources

7. Communications

8. Risk

9. Procurement

10. Stakeholders

THE PMI PROCESS: THE INTERSECTION

Table A1-1. Project Management Process Group and Knowledge Area Mapping

YOUR MISSION SHOULD YOU CHOOSE TO ACCEPT IT (AKA HOMEWORK)

- **Have a Process:** Write down all the steps you go through to complete a project & the time it takes to complete each step

  - Use this: http://www.gantter.com/

- **Have a Contract:** A detailed, *legal* contract. This is going to be your Project Charter. Stick to it!

- **Have a Plan (and stick to it):** How are you going to accomplish all of these steps?

  - Email Templates, Phone Calls, Meetings, 3rd party theme, with widgets?

  - **Start Here:** http://www.projectmanagementdocs.com/ (lots of awesome free templates!)

THIS IS HOW WE DO IT...NOW

REMEMBER: NO PROCESS IS PERFECT, IT WILL CONSTANTLY EVOLVE...AND THAT IS AWESOME!

INITIATION

1. **Discovery Meeting:** Project Goals + Challenges + Budget

2. **Proposal:** Address Challenges + Scope + Cost

3. **Contract:** Proposal + Payment Schedule

4. **Kick-Off:** Client Questionnaire + Project Plan Review

IF YOU'RE
WAITING
FOR A SIGN

THIS
IS IT.

PLANNING

In the PMI Galaxy, there would be a formal Project Plan
with milestones, deliverables, and timelines. And lots
and lots of meetings, meetings about meetings...

Have a plan that addresses each of the 10 Knowledge
Areas, this is the backbone of the project.

Reuse as much as possible, if you've already written
these things somewhere then reuse them...

DON'T WORRY,

I HAVE A PLAN

PROJECT INTEGRATION MANAGEMENT

How do all the moving pieces work together?

- 2 Words = Google Sheets.

- Based on your project requirements of all the elements, widgets, plugins, etc that need to work together. This is your SOW (Statement of Work)

- I put these right in our proposals and then into our contracts

PROJECT SCOPE MANAGEMENT

The work needed to get the project done on time, or what is the MVP (Minimum Viable Product)?

- Start with a Scope Statement (Entire Project Understanding)

- Guard this with your life.

- If a Client causes unplanned for additions to the Scope it's called Scope Creep

- If you do it, it's called Gold Plating

PROJECT TIME MANAGEMENT

What work needs to get done so the project ends on time?

Things to Consider, is the due date fixed (Drop Dead Date) or fluid?

- This is where http://www.gantter.com/ or using Agile come in handy

- Break down the objectives of the project into smaller tasks, and assign hour estimates to them

- This is why we give ranges for project completions.

- Give yourself a buffer & set the expectation with your client that you will be constantly assessing the project and will talk to them about any time challenges that come up so you can make a decision about it together.

PROJECT COST MANAGEMENT

How are you going to manage all the aspects of the project that affect the budget?

- **The big 4:** Cost, Time, Scope, Quality...You can not change one without affecting them all in a fixed project.
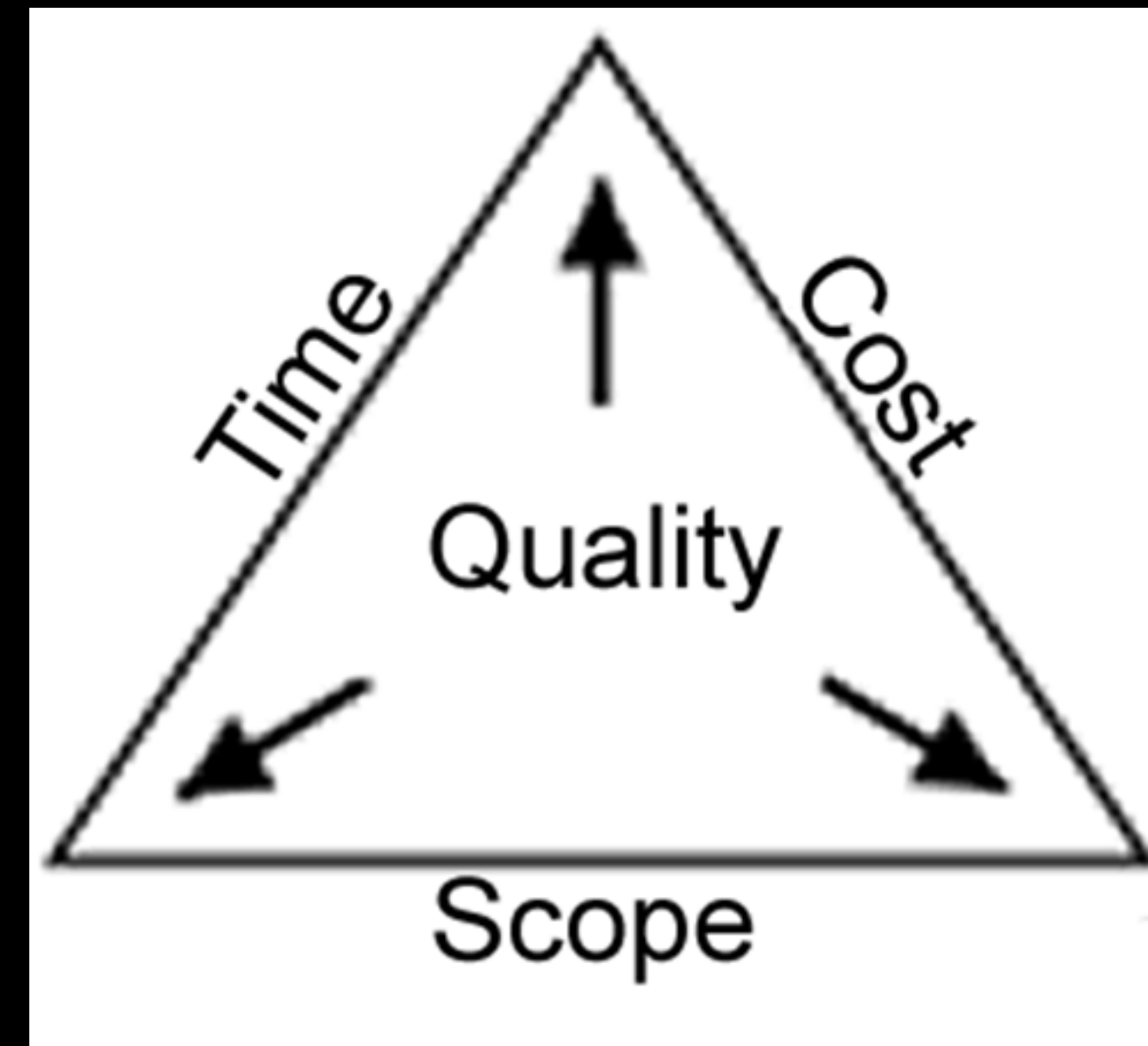
PROJECT QUALITY MANAGEMENT

How is quality assured and Who is responsible (check list)

- Pre-Launch & Post-Launch (allocate 8 hrs at least for this) and be prepared for the bugs that will ensue.

- We allow 1-2 weeks for QA, Testing, and Bug Squashing Pre-Launch & a 5-Day Debug Post-Launch

    - Include:

        - Current Browsers

        - Tablet, Mobile, Desktop Displays

        - *Older Browsers if that's part of your contract

PROJECT HUMAN RESOURCE MANAGEMENT

Who is doing the work/comprises the Project Team

Ours looks like this:

- Project Manager

- Lead Designer

- Production Designer

- Back-End Developer

- Front-End Developer

- Know what projects are on your plate and make a simple graph for where things overlap so you can allocate resources appropriately

PROJECT COMMUNICATIONS MANAGEMENT

PMI says that Project Management is 90% communication...I call Shenanigans

- I can not think of a single thing that I do that is not some type of communication

- Have some type of Task Management system:

  - We use JIRA

  - I like this one too: https://redbooth.com (Boo it used to be TeamBox and it was free)

  - When in doubt use a Google Doc, at least you can manage it in real time, track revisions!

  - Manage your email like a queue. Do not keep a full email box!

PROJECT RISK MANAGEMENT

Identify risks, have a plan

What is a risk? 'an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives'.

- Talk to your team, what are the challenges?

- Talk to the stakeholders, they know things

- Work these into your plan, see Time Management!

PROJECT PROCUREMENT MANAGEMENT

Do you need to purchase anything to make this project happen?

- 3rd Party Theme?

- Plugins?

- Independent Contractor to fill in the gaps?

- A pygmy goat?

PROJECT STAKEHOLDER MANAGEMENT

ID all the people & organizations impacted by the project

- What are their expectations?

  - Include them on every meeting/email

  - Who makes the final call, is there a chain of command decisions need to go through? How does this affect timeline?

  - Ask them how they would like to be managed and decide on a strategy.

  - You may not get it right on the first try but keep tweaking until it works for both parties

REFERENCES

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3. http://www.pmi.org/

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