None of us *manage projects* in the same way.
IT’S OKAY
AGILE?
Kanban - Scrum - No Estimates - Sprints - Backlogs

WATERFALL?
Milestones - Dependencies
HYBRID?
A Little Bit OF This, A Little Bit Of That…

AGILE?
Kanban - Scrum - No Estimates - Sprints - Backlogs

WATERFALL?
Milestones - Dependencies
AGILE

- Collaboration
- Iteration
- Focused
- Not driven by deadlines
WATERFALL

- Step-by-step
- Silos
- Milestone and deadline driven
HYBRID

- Collaboration
- Accounts for stakeholders
- Iteration
- Not driven by deadlines
Before you pick a process, consider:

- Team/talent
- Stakeholders/clients
- Scope
- Deadline
ESTIMATING & SCOPING
IT’S NOT EASY
estimate

verb
verb: estimate; 3rd person present: estimates; past tense: estimated; past participle: estimated; gerund or present participle: estimating

/ˈes.tɪ.mæt/ (diphthong)

1. roughly calculate or judge the value, number, quantity, or extent of.
   “the aim is to estimate the effects of macroeconomic policy on the economy”
   synonyms: calculate roughly, approximate, guess; More

noun
noun: estimate; plural noun: estimates

/ˈestɪmæt/ (diphthong)

1. an approximate calculation or judgment of the value, number, quantity, or extent of something.
   “at a rough estimate, our staff is recycling a quarter of the paper used”
   synonyms: rough calculation, approximation, estimation, rough guess; costing, quotation,
   valuation, evaluation; informal guesstimate
   “an estimate of the cost”
SO IF IT’S NEVER EXACT, WHY ESTIMATE?
IS THE PROJECT WORTH IT?
DO WE HAVE THE STAFF TO DO IT?
CAN WE GET A SENSE FOR HOW LONG IT WILL TAKE?
ARE WE EXCITED ABOUT THE PROJECT?
BUT STILL, YOU HAVE TO UNDERSTAND

- Your industry: trends, changes, innovation
- Your team and their capabilities
- What works/what doesn’t
- History on similar projects
ASK QUESTIONS

- What is the goal of the project?
- How will you and your client determine if the project is successful?
- What returns will you and your clients see as a result of the project?
- Who will participate from the client side?
- What range of services does the project require?
• What is your client’s budget for the project?
• Is there technology involved? If yes, what is it?
• Does your client employ anyone with expertise on the topic?
• What is the timeline?
• Will your services be required after delivery
DO WE HAVE THE STAFF FOR IT?
ESTIMATING TACTICS: WATERFALL & HYBRID PROJECTS.
TALK ABOUT THE PROJECT

BEFORE YOU START THROWING OUT NUMBERS
DISSECT THE
PROJECT, ISSUE,
OR FEATURE
DISCUSS GOALS
DISCUSS TIMELINES + RESOURCES NEEDED
CONSIDER
STAKEHOLDERS
AND PARTNERS
ESTIMATE IN THE OPEN
NOW START THINKING ABOUT STEPS & TASKS
A method by which you can visually represent the composition of a project by breaking down all project stages and aspects into their smallest possible components.
WORK BREAKDOWN STRUCTURE

Source: https://www.makeuseof.com/tag/organize-project-work-breakdown-structure/
WORK BREAKDOWN STRUCTURE: MOVING

1. SEARCH
   - Decide on neighborhood - 1 day
   - Find Realtor - 1 day
   - Look on realtor.com - 2 days
   - In-person visits - 12 days
   Total Time: 16 days

2. BUY
   - Loan approval - 5 days
   - Make an offer - 2 days
   - Conduct inspection - 1 day
   - Settlement - 1 day
   Total Time: 9 days

3. MOVE
   - Hire movers - 1 day
   - Pack boxes - 5 days
   - Get new keys - 1 day
   - Pay movers - 1 day
   - MOVE - 2 days
   Total Time: 10 days
BREAK EVERYTHING DOWN INTO SUB TASKS
SEEMS EASY, RIGHT?

If you get stuck:

- Don’t be afraid to ask questions
- Get granular
- Ask colleagues for opinions
- Check project histories
- Remember, it’s just an estimate!
ESTIMATING TACTICS: AGILE PROJECTS.
ISN’T AGILE ALL ABOUT... SPRINTS AND ESTIMATING STORIES?
IT’S ALL ABOUT SETTING EXPECTATIONS
FIRST EXPECTATION: AGILE PROJECTS REQUIRE DEDICATED TEAMS
SECOND EXPECTATION: ALL WORK IS DONE IN TIME-BOXED ITERATIONS
IN OTHER WORDS

How much does it cost for your whole dedicated team to work on only one project for one month?
WITHOUT THESE EXPECTATIONS IN PLACE, YOU WILL NEVER GET IT RIGHT.
IT’S NOT EASY
THINGS TO CONSIDER

• What roles do you need?
• How much time is “full time”?
• Will your team be truly dedicated?
• Will there be holidays or time off?
• Is there a blended rate for the team?
FIGURE OUT HOW MANY "SPRINTS" FIT YOUR PROJECT SCHEDULE AND ADD THEM UP.
1 RESOURCE, 4 WEEKS = $10K

2 WEEK SPRINTS

1 RESOURCE, 1 SPRINT = $5K

6 MONTHS = 12 SPRINTS

4 RESOURCES, 12 SPRINTS

4 X $5K = $20K X 12
PROJECT COST = $240,000
SEEMS TOO EASY, RIGHT?
IT WILL NEVER BE PERFECT
BUT, THIS METHOD ALLOWS YOU TO SAY:
“Our agile release planning session says the website redesign project will take 12 sprints, totaling $240K. Is that estimate in line with what you’ve budgeted?”
“Sure, Sir Stakeholder, we can add that last-minute request. However, the team says that will take another sprint to complete it as you’ve requested, so the change in project cost will be $20k. Can you authorize the additional budget?”
“Team, we have to be ruthless about bugs. Any bug that prevents us from going live will cost us $20K in an extra sprint, and you all know our bosses—or our clients—will not be happy about that.”
“I know we are falling behind, but if we extend the iteration until we feel we are done, I have no way of forecasting the financial impact. However, if we simply extend the project by one extra sprint, I can tell you it will cost exactly $20K.”
AGAIN, IT WILL NEVER BE PERFECT. BUT HAVING BACKUP HELPS.
ESTIMATING TASKS ON AGILE PROJECTS.
USER STORIES

As a (ROLE) I want to (DESIRED ACTION) so I can (WHY I WANT TO DO THIS).
FORGET WEEKS, DAYS, HOURS. USE STORY POINTS
Fibonacci: 0, 1, 2, 3, 5, 8, 13, 21, 34, 55, 89...

Image source: https://www.slideshare.net/AmaadQureshi/introduction-to-agile-estimation-planning
Planning Poker

Image source: https://kenschwaber.wordpress.com/2011/03/11/planning-poker/
T-shirt Sizing

REASONS TO USE STORY POINTS

- Score just the work, not all the time around it
- No emotional connection to dates or time
- Allows team members to score at their own ability
- There is no time tracking
GENERAL ESTIMATING

RECONS:

• Estimate as a team
• Develop a shared language
• Create a routine (intake questionnaire, scoping sessions, agenda for discussions)
• Communicate about expectations around scope and deadline, and use that to create estimates
CHAPTER 4

THE DARK ART OF PROJECT ESTIMATION

WRITTEN BY BRETT HARNED
PROJECT PLANNING
PROJECT PLANS ARE A FORM OF COMMUNICATION
PROJECT B SCHEDULE

MONTH 1

WEEK 0: SIGNED CONTRACT CLIENT QUESTIONNAIRE
  - stakeholder interviews
  - research
WEEK 1: STRATEGY
  - internal + client kickoffs
WEEK 2: UX + VISUAL PREP (UX DELIVERABLE 1)
WEEK 3: UX: (UX DELIVERABLE 2) + FEEDBACK, REVISIONS
WEEK 4: VISUAL DESIGN/BACKEND DEV BEGINS (UX SIGN OFF)
  - COPY DEADLINE 1

MONTH 2

WEEK 5: VISUAL DESIGN/BACKEND DEV (CRD 1)
WEEK 6: VISUAL DESIGN/BACKEND DEV (CRD 2)
WEEK 7: DEV - BACK/Front
WEEK 8: DEV - BACK/Front
WEEK 9: DEV - BACK/Front
WEEK 10: DEV - BACK/Front
WEEK 11: QA TESTING/INTERMEDIATE

MONTH 3

WEEK 12: QA TESTING/FINAL
Client Name Project Schedule

The following is a high-level overview of milestones that will take place for the PROJECT NAME. Please refer to the notes column for dependencies.

January 2014

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<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
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<td><strong>12/7 (conference call) All stakeholders should be present</strong></td>
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<td>Part One: Plan</td>
<td>HRMS + Barrel Meeting Moodboard, Wireframes, and Content Plan (3 hours in person)</td>
<td>HRMS + Barrel Meeting Technical Requirement Document and Implementation Plan (1-2 hours in person)</td>
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<td>18</td>
<td><strong>12/9 Post onto basecamp. This milestone impacts Barrel’s ability prepare for the Workshop.</strong></td>
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<td><strong>12/18 (in-person at Barrel) All stakeholders should be present at Barrel. This date can be flexible. 12/16 and 12/17 are also options.</strong></td>
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The Gantt Museum Website Redesign

- **Project Research & Discovery**
  - PT: Conduct Stakeholder Interviews
  - PT: Review current site analytics
  - PT: Review brand guidelines
  - PT: Prep for kickoff meeting
  - ALL: Kickoff Meeting
  - 100%

- **Project Brief and Project Plan**
  - PT: Deliver Project Brief & Final Plan
  - GM: Provide Feedback on Project Brief & Final Plan
  - PT: Update Project Brief for approval
  - GM: Approve
  - 38%

- **UX Design**

- **Site Map**
  - PT: Create v1 Site Map
  - PT: Present v1 Site Map
  - GM: Provide Feedback
  - PT: Deliver v2 Site Map for approval
  - GM: Approve Site Map
  - 0%
COMMUNICATE IN A WAY THAT WORKS FOR EVERYONE
A GOOD PLAN WILL:

• Communicate major deliverables
• Show the process by which you will provide deliverables or features
• Communicate timing and deadlines
• Show dependencies
• Show roles and assignments
5 SIMPLE STEPS TO CREATE A SOLID PROJECT PLAN
1. RESEARCH & PRE-PLANNING
KNOW YOUR PRODUCT & STAKEHOLDERS:

Conduct your own research to dig deeper on:

- Goals/Outcomes
- Partnerships and outlying dependencies
- Potential issues and risks
IMPORTANT FACTORS TO DISCUSS:

- Product ownership and the decision making process
- Stakeholder interest/involvement levels
- Key outages, meetings, deadlines, and driving factors
- Related or similar projects, goals, and outcomes
- The best way to communicate with partners and stakeholders
ALWAYS KNOW YOUR TEAM:

- Expertise
- Interests
- Collaboration and communication styles
- Availability and workload
2. DRAFT YOUR PLAN
START ROUGH

Sketch and consider:

• General process
• Deliverables
• Sign offs/feedback and iteration plans
• Resourcing
• Deadlines
NEW PROJECT: SITE REDESIGN
DUE: 6 MONTHS!

MONTH 1:
DISCOVERY
   LEAD
   PM
   - Stakeholder Interviews (2w)
   - Review Analytics + Research (2w)
   - Prep Kickoff (1w) - ALL
   - Kickoff (2d) - ALL
   LEAD - WRITE BRIEF (1w)
   - CLIENT APPROVAL (3D)
   - ASK CLIENTS ABOUT TIMING

MONTHS 2-4:
UX, DESIGN + CONTENT → IN TANDEM
   1. SITEMAP (2w) → W/ REAL CONTENT
   2. PROTOTYPE (3w) → W/ REAL CONTENT
   3. DESIGN CONCEPT (2w)
   4. PAGE DESIGNS/MODULE DESIGNS
   - IN CODE? (ASK TEAM)

MONTHS 5-6: CODE
1. SET UP BACKEND → WHAT IS IT?
2. FRONT-END DEVELOPMENT → Prototype?
3. QA (2w) → PROCESS Q.
   - DESIGN APPROVALS?
REVIEW
YOUR IDEAS
WITH YOUR TEAM
3. MOVE IN TO TEAMGANTT
LIVE DEMO
FORMATTING TIPS

- Break tasks into sections, or groups of tasks
- Assign tasks to individuals or groups
- Use notes to clarify tasks
- Add dependencies
- Double-check start and end dates
4. PRESENT & CONFIRM YOUR PLAN
REVIEW THE PLAN AGAIN WITH YOUR TEAM
BE SURE TO DISCUSS

- Review times
- Team work times
- Dependencies
- Time out/off, meetings, milestones
- Final deadline
- Any assumptions you have made
- Major changes since your last talk
CONFIRM IT.
DELIVER TO STAKEHOLDERS.
EXPLAIN.
5. MANAGE & UPDATE
PLANS CHANGE CONSTANTLY!
ADAPT TO CHANGE

- Make updates on progress and changes regularly
- Communicate changes to your team, partners and stakeholders
- Communicate risks
PROJECT PLANNING TIPS & TRICKS FOR AGILE PROJECTS
UMMMM...

DO YOU ACTUALLY “PLAN” AGILE PROJECTS?
TRACK THE DETAILS.
STAY ENGAGED.
ADAPTING SCRUM WHEN WORKING WITH CLIENTS OR STAKEHOLDERS
1. IDENTIFY ROLES
THE ROLES OF SCRUM:

- Product Owner (Client)
- Product Manager (Team Lead)
- Scrum Master (PM)
- Development Team (UX, Design, Dev Teams)
2. DEFINE YOUR CADENCE
SCRUM CEREMONIES:

- Sprint Planning
- Daily Standup
- Sprint Demo
- Sprint Retrospective
SET CLEAR EXPECTATIONS ABOUT WHO WILL ATTEND EACH CEREMONY.
3. SET GROUND RULES
THINGS TO CONSIDER:

- Additional stakeholders (and the weight of their opinions)
- How you will account for feedback
- How you will keep clients in the loop regarding risks, issues, budget
- Launch dates: Beta? Final?
BE A STICKLER FOR THE RULES.
CARRY ON AND PLAN
THANK YOU!

brettharned.com
brett@brettharned.com
@brettharned
GET 2 MONTHS

• Save on Standard or Advanced plan
• Discount expires after 24hrs.
• Use URL below
• Must be on a free TeamGantt account to get discount

TEAMGANTT.COM
/SAVE