AGENDA

1:00-1:30  Introductions, Groups
1:30-3:00  Estimating Projects Exercise
3:00-3:20  Break
3:20-4:45  Project Planning Exercise
4:45-5:45  PM Challenges Discussion & Presentation
5:45-6:00  Q&A
6:00-8:00  Happy Hour
TODAY IS ABOUT:

PARTICIPATING

SHARING

DEBATING

LEARNING
FACT: NONE OF US ARE MANAGING PROJECTS THE SAME WAY.
IT’S OKAY
GROUPS!

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

WATERFALL?
Milestones - Dependencies

HYBRID?
A little bit to this, a little bit of that…
SAY HELLO.

WHERE YOU WORK.

YOUR TITLE/ROLE.

WHAT YOU LIKE ABOUT DPM.
ESTIMATING & SCOPING EXERCISE
WHAT WE’LL DO:

• Review a project scenario
• Discuss and estimate the project together
• Present and discuss estimates as a larger group
• Create project plans as groups
• Present and discuss plans as a larger group
QUESTIONS?
YOUR PROJECT: OBERLIN COLLEGE
COLLEGE OF ARTS & SCIENCES

new.oberlin.edu/arts-and-sciences/
The College of Arts & Sciences: Liberal arts education in the humanities, social sciences, and natural sciences.

College of Arts and Sciences

The College of Arts and Sciences offers a rich and balanced curriculum in the humanities, social sciences, and natural sciences. We welcome young passionate intellectuals who are eager to help make the local community and the world a better place.

RELATIONED LINKS

At a Glance
Arts and Sciences Admissions
Academics
Departments and Programs
Courses
Advising and Support
Sciences at Oberlin
International Entrepreneurship
Facilities
Art Museum
Libraries
Technology at Oberlin
Oberlin College Press

CONNECT WITH OBERLIN

PHOTO GALLERY

NEWS

View All News Stories
YOUR CLIENT IS ASKING FOR:

- A completely new, responsive website:
  - Revised IA
  - New look and feel
  - Refreshed content
  - A modern CMS

Pretty much everything...
WITH GOALS TO:

- Go responsive!
- Increase applicant diversity
- Decrease email and call volume for confused applicants
- Make prospects more excited about Oberlin
AND THEY WANT IT IN:

SIX MONTHS
AND YOU’RE LIKE...
“IT’LL BE FAST AND CHEAP, RIGHT?”

- EVERY STAKEHOLDER
AND AGAIN
YOU’RE LIKE…
NO MATTER WHAT, WE HAVE TO FIGURE IT OUT.
Given your chosen method, how will you estimate the work and articulate the scope?
ESTIMATE & SCOPE
THE PROJECT

20 MINUTES
REMEMBER,
IT’S JUST AN EXERCISE!
FIVE MINUTES
REGROUP
FOR MY WATERFALL & HYBRID PEEPS
ARTICULATE EFFORT

• Dissect the project, issue, or feature
  • Discuss goals, timeline, resources
  • List assumptions

• Think about
  • Stakeholders, partners involved
  • Team availability and expertise level

• Estimate in the open
  • Compare notes & discuss
A **Work Breakdown Structure (WBS)** is 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: MOVING

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

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

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 IN TO 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 (if you have them)
• Remember it’s just an estimate!
FOR MY AGILE PEEPS
ARE AGILE PROJECTS EASIER OR HARDER TO ESTIMATE?
How do I calculate the cost of my agile project if I don’t do all up front planning?
1. DEMAND A DEDICATED TEAM
2. CALCULATE 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?
THINGS TO CONSIDER

• What roles do you need?
• How much time is considered “full time”
  • Think about company meetings, management tasks, etc.
• Will your team be truly dedicated?
• Will there be holidays or time off?
• Is there a blended rate for the team?
2. MULTIPLY THE TIME-BOXED ITERATION TO FIT YOUR PROJECT SCHEDULE
1 RESOURCE, 4 WEEKS = $10,000
2 WEEK SPRINTS
1 RESOURCE, 1 SPRINT = $5,000

6 MONTHS = 12 SPRINTS
4 RESOURCES, 12 SPRINTS
4 x $5,000 = $20,000 x 12
PROJECT COST = $240,000
IT WILL NEVER BE PERFECT
“Our agile release planning session says the Oberlin College 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 BACK UP SURE HELPS.
SCOPING/ESTIMATING RECOMMENDATIONS

• Create small teams to help scope new projects

• Create a routine for initiating and scoping new projects (Project intake questionnaire, scoping sessions, an agenda item on team meetings, etc.)

• Communicate about expectations around scope and deadline, and use that to create estimates
QUESTIONS?
BREAK

20 MINUTES
GROUP PLANNING
EXERCISE
THE PROJECT:

A complete redesign of Oberlin College’s website

We must have a new site in place in **6 months** from today

The core stakeholders are a web committee, chosen by the College

You’re responsible for UX, design, content, and front- and back-end code.

YOU WILL:

- Sketch a plan
- List your assumptions

CONSIDER:

- Process
- Tasks & Effort
- Roles and Resources
- Risks
- Stakeholders & Feedback
PLAN THE PROJECT

20 MINUTES
THE PROJECT:

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YOU WILL:

• Sketch a plan
• List your assumptions

CONSIDER:

• Process
• Tasks & Effort
• Roles and Resources
• Risks
• Feedback timing
FIVE MINUTES
PROJECT PLANS ARE A FORM OF COMMUNICATION
<table>
<thead>
<tr>
<th>Section</th>
<th>Details</th>
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<tbody>
<tr>
<td><strong>1.2.1.1) Batch 1</strong></td>
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<tr>
<td>1.2.1.1.1) HC: Deliver HTML Wireframes Batch 1</td>
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<td>1.2.1.2.3) HC: HTML Wireframes Batch 2 Revisions</td>
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<td><strong>1.2.2) Design</strong></td>
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<td>1.2.2.1) Design Concepts</td>
<td>5w 4d</td>
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<td>1.2.2.1.1) HC: Deliver Graphic Design V1</td>
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<td>1.2.2.1.2) GM: Provide Feedback on Design V1</td>
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Credit: @brennaheaps, @omniplan
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, REVISIIONS
WEEK 4: VISUAL DESIGN / BACKEND DEV BEGINS (UX WIP)
          COPY DEADLINE 1

MONTH 2

WEEK 5: VISUAL DESIGN / BACKEND DEV
          CD 2
WEEK 6: VISUAL DESIGN / BACKEND DEV
          CD 3
          (VISUAL DESIGN SIGN OFF)
WEEK 7: DEV - BACK/Front
WEEK 8: DEV - BACK/Front

MONTH 3

WEEK 9: DEV - BACK/Front
WEEK 10: DEV - BACK/Front
WEEK 11: QA / TEST // STAGING SITE REVIEW
WEEK 12: QA / TEST // LAUNCH!
### 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**

<table>
<thead>
<tr>
<th>Sunday</th>
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COMMUNICATE IN A WAY THAT WORKS FOR EVERYONE
FOR MY WATERFALL & HYBRID PEEPS
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 team roles and assignments
5 STEPS TO CREATE A SOLID 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 decision making process
- Stakeholder interest/involvement levels
- Key outages, meetings, deadlines and driving factors
- Related or similar projects, goals, and outcomes
- The best ways to communicate with partners and stakeholders (meetings, presentations, etc.)
ALWAYS KNOW YOUR TEAM

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

• General process
• Deliverables
• Sign offs/Feedback and iteration plans
• Resourcing
• Deadlines
REVIEW YOUR IDEAS WITH THE TEAM
3. MOVE IN TO A PLANNING TOOL
BREAK TASKS IN TO SECTIONS

1) Discovery Phase

2) UX Phase
   2.1) Sitemap
       2.1.1) MA: Create Sitemap
       2.1.2) Sitemap Review Meeting
       2.1.3) MA: Deliver Fin...
   2.2) Wireframes & Content
       2.2.1) MA: Create Wirefra...
       2.2.2) Wireframes Revi...
       2.2.3) MA: Deliver Wirefra...
       2.2.4) PO: Approve Wireframes

3) Graphic Design Phase
   3.1) Concept Design
       3.1.1) MA: Create Conc...
       3.1.2) Concept Review Meeting
       3.1.3) MA: Deliver Revis...
       3.1.4) PO: Provide Feedback
ASSIGN TASKS TO GROUPS

- 3.1.1) MA: Create Concept Design
- 3.1.2) Concept Review Meeting
- 3.1.3) MA: Deliver Revised Concept
- 3.1.4) PO: Provide Feedback
- 3.1.5) MA: Deliver Final Concept for Approval
- 3.1.6) PO: Approve
### 3) Graphic Design Phase

#### 3.1) Concept Design

1. **3.1.1) MA: Create Concept Design**
   - Our team will create 3 concepts to be presented
   - 5/1/15, 8:00 AM to 5/8/15, 9:00 AM
2. **3.1.2) Concept Review Meeting**
   - Your team will select one concept with modifications
   - 5/8/15, 9:00 AM to 5/11/15, 9:00 AM
3. **3.1.3) MA: Deliver Revised Concept**
   - 5/11/15, 9:00 AM to 5/13/15, 9:00 AM
**CLARIFY DEPENDENCIES**

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<th>End Date</th>
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<tr>
<td>2.2) Wireframes &amp; Content</td>
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<td>5/8/15, 5:00 PM</td>
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<td>2.2.2) Wireframes Review meeting</td>
<td>5/11/15, 8:00 AM</td>
<td>5/11/15, 5:00 PM</td>
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<tr>
<td>2.2.3) MA: Deliver Wireframes v2/Conduct testing</td>
<td>5/12/15, 8:00 AM</td>
<td>5/18/15, 5:00 PM</td>
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<tr>
<td>2.2.4) PO: Approve Wireframes</td>
<td>5/19/15, 8:00 AM</td>
<td>5/20/15, 5:00 PM</td>
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</table>
4. PRESENT & CONFIRM
REVIEW THE PLAN WITH YOUR TEAM AGAIN.
BE SURE TO DISCUSS

• Review times
• Team work times
• Dependencies
• Time out, meetings, time off
• Final deadline
• Any assumptions you’ve made
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
FOR MY AGILE PEEPS
ADAPTING SCRUM TO CLIENT WORK
1. IDENTIFY ROLES
ROLES OF SCRUM

• Product Owner
• Scrum Master
• Development Team
• Client
• PM
• Development Team
2. DEFINE YOUR CADENCE
**CEREMONIES**

- **Sprint planning:** A team planning meeting that determines what to complete in the coming sprint.

- **Daily stand-up:** Also known as a daily scrum, a 15-minute mini-meeting for the software team to sync.

- **Sprint demo:** A sharing meeting where the team shows what they've shipped in that sprint.

- **Sprint retrospective:** A review of what did and didn't go well with actions to make the next sprint better
BE SURE TO SET CLEAR EXPECTATIONS ABOUT WHO WILL ATTEND EACH CEREMONY.
2. 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 budget and risks
- Launch dates: Beta? Final?
BE A STICKLER FOR THE RULES.
CARRY ON & PLAN
PROJECT SCENARIOS

DISCUSSION & PRESENTATION
DPM CHALLENGES
WHAT ARE THE BIGGEST CHALLENGES YOU FACE ON PROJECTS?
CLUSTER BY CATEGORY

**TECHNICAL SKILLS**

like process, estimating, etc.

**SOFT SKILLS**

like managing people, dealing with clients, etc.
LET’S DISCUSS
WE ALL SHARE THE SAME CHALLENGES. LET’S FIX THEM TOGETHER.
COMMON PROJECT SCENARIOS
RISKY BUSINESS:

You’re relying on stakeholders to deliver content on a weekly basis, but they haven’t sent anything to your team yet...and it’s been 2 weeks.

Late content is ALWAYS a problem on web projects. How can you, as a project manager, help to communicate the issue and its effects on the project?
CREATE A PARALLEL PROCESS FOR CONTENT ON EVERY PROJECT
CREATE A PARALLEL PROCESS FOR CONTENT
GET AN EARLY START WITH CONTENT.
WORK CONTENT INTO THE DESIGN PROCESS
Set expectations early! Understand how much content you need to support, and how it logically fits together.

That will help you to determine what needs to be written, and who will write it.
This is the short copy and clear language used to help your users understand the experience.

Know that short does not mean easy!

Gain consensus early, but know that the risk of changing labels is low.
LONG-FORM CONTENT

It takes time to thoughtfully write or rewrite content for a website.

Not only do you need to consider the actual writing process, you must account for the time needed to properly review, edit, and approve the content.
Your CMS can only support your content needs when those needs are clearly defined and shared.

If you can select a CMS early on, you can make content decisions in tandem with building the CMS.
ARTICULATE NEEDS EARLY.
ASSIGN RESPONSIBILITY.
FOLLOW-UP.
COMMUNICATE RISKS.
6 TIPS TO MANAGE RISK
1. IDENTIFY RISKS EARLY
LIST YOUR ASSUMPTIONS.
TALK ABOUT WHY THEY ARE RISKS.
WHAT DOES THAT MEAN FOR THE PROJECT?
2. BE INCLUSIVE
ENSURE YOUR WHOLE TEAM & STAKEHOLDERS ARE AWARE OF ALL PROJECT ACTIVITIES
3. COMMUNICATE
MAKE IT A TOPIC OF DISCUSSION; ADD IT TO STATUS REPORTS
4. ANALYSE & PRIORITIZE
UNDERSTAND IMPACTS
& IDENTIFY POSSIBLE RESPONSES
5. CLARIFY OWNERSHIP

WHO CAN HELP AVOID THE RISK BECOMING A TRUE ISSUE? HOW?
6. NEVER IGNORE
KEEP THEM IN WRITING.
MAKE SURE OTHERS ARE
AWARE. TRACK THEM.
ALWAYS SPEAK UP
QUESTIONS?
Q&A