Hi, I’m Brett
hello.
YOUR TURN
DPM CHALLENGES
WHAT ARE THE BIGGEST CHALLENGES YOU FACE AS A DPM?
WE ALL SHARE THE SAME CHALLENGES. LET’S FIX THEM TOGETHER.
PROJECT SCENARIOS
DISCUSSION & PRESENTATION
HELP THEM:

Your clients don’t understand what your team does (design, UX, development, etc.), how your projects work, or the effort involved for everyone.

How can you, as a project manager, help your clients understand all of these things?
THE FIRST MEETING:

- Set the tone for the project
- Review your scope together
- Talk about roles and responsibilities
- Discuss preferred modes of communication
- Always communicate next steps
IDENTIFY STAKEHOLDERS

- Project Owner/Core Team
- Primary Stakeholders
- Secondary Stakeholders
- Management
- Executive
GRAB THIS RESOURCE

http://brettharned.com/blog/workshop-resources/

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### Stakeholder Decision Matrix

List all project stakeholders on this sheet. Some may appear on more than one list. This should include everyone from the Project Sponsor, PM, and highest levels of decision makers.

#### Project Owner(s)/Core Group

- 
- 
- 

#### Primary Stakeholders

- 
- 
- 

#### Secondary Stakeholders

- 
- 
- 

#### Executive Stakeholders

- 
- 
- 

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After identifying all stakeholders, review your process and deliverables. List them out and talk to your client about each and every point in the project. Discussing these decisions and their impacts on the overall project will help you to identify reviewers and decision makers.

<table>
<thead>
<tr>
<th>Definition</th>
<th>Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverables:</td>
<td>Deliverables:</td>
</tr>
<tr>
<td>Decisions/Impacts?</td>
<td>Decisions/Impacts?</td>
</tr>
<tr>
<td>Final Decision Maker(s)?</td>
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<tr>
<th>Content</th>
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</table>
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
SAMPLE
STAKEHOLDER QUESTIONS

As a project manager, it’s your job to set expectations and work with your team and clients to establish good communication patterns. A simple conversation can help you to wrangle the info you need to set everyone up for success.

Set some time aside with your main client contact and ask them some questions about process, organizational politics, and general risks. Doing so will not only convey that your team has the experience to handle any type of difficult personalities or situation, it shows that you care about the project and want it to run smoothly. Here are some questions that could help you:

• Has your team discussed how you will gather feedback?
• Who is the final sign off? Or who owns the project?
• Is there a stakeholder we need to consider who is not on your list? (A president, dean, the boss’s spouse?)
• What is the project deadline? What are the factors or events that are calling for that date? (i.e. a meeting, ad campaign, an event)
• Are there any dates when you will be closed or not available?
• Will there be any meetings or points in the project where you’ll want us to present on the current project status to a larger group (i.e. a board meeting)?
• Has your team been through a project like this in the past? If yes, how did it go?
• Is there anything that would prevent the project from being successful?
• Does your organization have a preferred mode of communication?
• Are there any points in the process that some stakeholders might not understand that we can explain?
New Stakeholder Onboarding Process

It's a fact: New clients take time to join the team. If your team isn't prepared, the momentum and goodwill that you earned in the project may slow down. Here are some tips on how to make sure your new clients' onboarding goes smoothly:

This checklist is meant to help you guide a conversation about project history—future with your new clients. Only one team will know these details, but these level topics to keep in mind:

- Scope document
- Invoicing
- Creative brief; project goals
- Requirements document
- Stakeholder decision matrix
- Project plan
- Communication tools, preferences
- Deliverable
- Research
- UX
- Content Strategy
- Design
- Front End Development
- Back End Development
- Usability Testing

Sample Deliverable On-boarding Sheet

**Deliverable:** Site HTML Wireframes (thumbnail to the left)

**accessible at:** <URL>

**Goals:** To define site content hierarchy on home, landing, and detail pages. These are not intended to provide direction on graphic design or final content.

**Description:** The Agency delivered 8 wireframes with variations on each page. These variations helped the team to make decisions on:

**Date of delivery:** January 4, 2014; Final approval on February 5, 2014

**History:** Our team revised this deliverable 3 times and presented it twice in person to the core team and the executive committee. Major points of feedback were about navigation order and representation of blog content on the home page. Arnold Stakeholder was the final approver of this deliverable.

**Impacts:** This deliverable details decisions that are critical to the entire project. Changes to any details could impact the overall success of the project.
ALWAYS KNOW YOUR TEAM

• Expertise
• Interests
• Collaboration and communication styles
• Availability and workload
PROJECT RESEARCH IS NOT JUST ABOUT DESIGN
DESIGN CONFUSION:

Feedback can be difficult. You might expect an approval but hear the following:

• 5 stakeholders love the design
• 3 dislike it but cannot explain why
• 2 have not provided any feedback...yet

This is the kind of thing that will drive designers mad...and kill timelines and budgets.

How can you help, project manager?
PROJECT MANAGERS
MODERATE
GOOD
FEEDBACK
5 TIPS TO GET BETTER FEEDBACK
1. Prepare Everyone for a Good Presentation
2. Observe and Take Good Notes
3. Set Ground Rules on How You Accept Feedback
4. Be Clear About Your Feedback/Revision Plan
5. Facilitate Healthy Conversation
NEVER BE AFRAID TO ASK QUESTIONS
DEFEAT SCOPE CREEP:

You deliver what you think is an amazing product and your client says, “This feature is not working the way we expected.”

This can kill your budget, extend your timeline, and upset your team.

How can you, as the PM, help?
GOOD
PROJECT MANAGERS ARE ALWAYS PREPARED FOR THE WORST
WRANGLE DOCUMENTS

- Scope
- Strategy Brief
- Requirements
- Project Plan
- Status Reports
- UX & Design Deliverables
Let me refer back to the estimate/scope and get back to you.
ESTIMATES ARE NOT EXACT
estimate  uppskattning

noun

noun: estimate; plural noun: estimates

ˈɛstɪmət/

1 1. an approximate calculation or judgement of the value, number, quantity, or extent of something.
ARTICULATE EFFORT

- Dissect the issue or feature
  - Discuss goals
- Determine impacts
  - Budget
  - Timeline
- Show your estimates, be transparent
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:

WIREFRAMES

BRAINSTORM
Internal Meeting
Personal Brainstorming

Total Time: 2 days

DESIGN
Create Wireframes
Internal Team Review
Internal Iteration

Total Time: 10 days

PRESENT
Prep presentation
Review with Client
Collect Feedback (x3)
Iterate (x2)

Total Time: 15 days
BREAK EVERYTHING DOWN INTO SUB TASKS
OTHER ITEMS TO DISCUSS

If scope changes, these things may change too:

• Timeline
• Requirements
• Budget
• Resource availability
• Quality of work
SEEMS EASY, RIGHT?

If you get stuck:

• Don’t be afraid to ask questions
• Ask colleagues for opinions
• Check project histories (if you have them)
• Remember it’s just an estimate!
ALWAYS KNOW WHAT IS HAPPENING ON YOUR PROJECTS & AVOID SURPRISES
CHAPTER 4

TAMING THE SCOPE CREEP

WRITTEN BY BRETT HARNED

QUESTIONS?
THE DIFFICULT CONVERSATION:

The designer on your team has been negative about the project from day one. You’ve done your best to handle it, but the rest of the team has started to complain, because one person is affecting team morale and the work is suffering.

How can you, as the PM, address the issue and help everyone get along?
PREPARE YOURSELF

• Understand the issue
• Understand the impacts
• Put yourself in the other person’s shoes
• Think through the potential outcomes
MEET 1-ON-1

• Explain the issue; be honest & direct

• Listen

• Be open to (and ready for) emotions

• Be understanding

• Don’t leave without a next step or a resolution

• Keep it between you; Preserve the relationship
ALWAYS FOLLOW UP
HANDLE ISSUES HEAD ON
Q&A
THANK YOU!

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COMING SOON:

TRAINING

A BOOK

Pathfinder
DIGITAL PROJECT MANAGEMENT

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Rosenfeld