Michael E. Gill

THE PROCESS OF COMMUNICATION

A Practical Guide to Project Management

1991   1996   2000   2012

1994   1998   2007

Communication is not about knowing the process. Communication is about managing the process.

Setting & Managing Expectations

Four Laws of Communication

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"Proper planning prevents poor performance."

Dale Carnegie

Four Laws of Communication

"The quickest way to get from point A to point B is a straight line."

As the crow flies

Four Laws of Communication
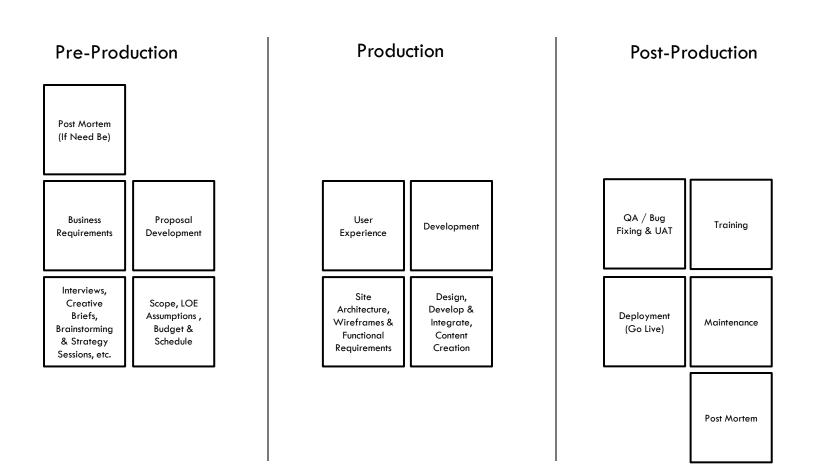
"Procrastination is the thief of time; collar him."

Charles Dickens

Four Laws of Communication

"If you don't learn from history, you'll be doomed to repeat it."

Your 8th Grade History Teacher

Pre-Production

Post Mortem (If Need Be)

Business Requirements

Proposal Development

Interviews, Creative Briefs, Brainstorming & Strategy Sessions, etc.

Scope, LOE Assumptions, Budget & Schedule

Production

User Experience

Development

Site Architecture, Wireframes & Functional Requirements

Design, Develop & Integrate, Content Creation

Post-Production

QA / Bug Fixing & UAT

Training

Deployment (Go Live)

Maintenance

Post Mortem

Pre-Production

Set expectations

Post Mortem (If Need Be)	
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	Post Mortem

Preproduction

□ Setting expectations

Requirements Gathering

Assumptions

Level Of Effort (LOE)

Timeline

Requirements Gathering

- Document early
- Drive requirements
- Facilitate the solutions
- Cornerstone documents
- Give them what you need
- Don't fall into the traps!

Don't fall into the trap!

- "We don't have enough time to take a month to create a requirements document. Everyone will want to see it and give us their two cents."

Don't fall into the trap!

- "We'll gather the requirements during production ahead of development."

Don't fall into the trap!

□ "The client doesn't want ~~to pay for~~ documentation; they want to see progress."

Level of Effort

- Knowing the solution

- The time it takes for each person to build their piece

- The integration of each independent piece

- Effort put toward the QA / Bug Fixing Loop

Assumptions

- *Assumptions help to mitigate the risk involved in the unknowns*

- Inform the client of them

- Voice your concern

- Don't cut resources or the schedule and keep the same size deliverable

Assumptions

Project Assumptions

ID	Title	Assumption	Change
1	Development	A third developer will begin on the project on 8/12/13. There will be a team in place to support the live site during Christmas break (excluding the holidays)	A third developer was hired on 8/26 and that person is working in support of our two primary developers.
2	Requirements	Functional and Business Requirements will not change from 7/26/13 delivery.	Additional requirements to the Program Comparison Page & Program Finder. The newest requirement is to have Business Challenges take over the "what would you do" section of the home page. This will link to a Generic Sub Page that is yet to be defined. The schedule has been pushed to accommodate these changes.
3	Design	Designs will not change from 7/26/13 delivery. Design assets will be delivered per the Content/Asset Delivery matrix delivered to Threespot on 7/23/13.	
4	Photography	Most (% to be determined) new photography will be implemented post launch.	The two final Photo-shoots have been scheduled. Faculty Bio's photo shoot's are being scheduled. All photography needs to be delivered in three batches with the last no later than October 25, 2013
5	Site Map	Will not change from 7/26/13	

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Project Planning

Delivery Date = Requirements x Level of Effort + Assumptions

Project Planning

- Be Present in the Moment
- Work Front to Back
- Forecast the Future
- Don't Take Shortcuts

Capacity Plan

Group Days	Name	Number of Work Days	Time Allocation	Discount	Vacation Days	Work Capacity Days
30.0	JSP / Portal Dev.					
	Manish	15	50%	10%	0	6.0
	Ashwini	15	100%	10%	1	12.5
	Mahesh	15	40%	10%	0	4.5
	Arun	10	100%	10%	2	7.0
43.0	Site Dev					
	Harjot	15	100%	10%	0	13.5
	Pramod	10	75%	10%	3	3.5
	Rahul	15	100%	10%	0	13.5
	Sureshkumar	15	100%	10%	1	12.5
35.5	QA					
	Abhishek	10	65%	10%	0	5.5
	Himanshu	13	100%	10%	2	9.7
	Shuchika	15	100%	10%	1	12.5
	Amit Pandey	12	75%	10%	0	7.8
1.5	Design / UX					
	Greg	10	25%	10%	0	1.5
	Team Work Capacity					**110.0**
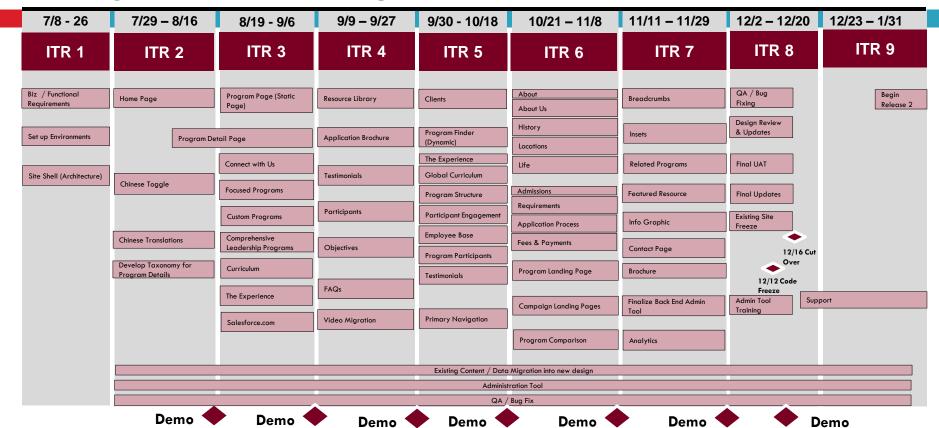
Capacity Plan

Name	Number of Work Days	Time Allocation	Discount	Vacation Days	Work Capacity Days
JSP / Portal Dev.					
Manish	15	50%	10%	0	6.0
Ashwini	15	100%	10%	1	12.5

Rules to Project Planning

- Every project will have obstacles

- Distance equals time

- The LOE needs input from everyone

- Trust it

High Level Project Plan

7/8 - 26	7/29 – 8/16	8/19 - 9/6	9/9 – 9/27	9/30 - 10/18	10/21 – 11/8	11/11 – 11/29	12/2 – 12/20	12/23 – 1/31
ITR 1	**ITR 2**	**ITR 3**	**ITR 4**	**ITR 5**	**ITR 6**	**ITR 7**	**ITR 8**	**ITR 9**

ITR 1	ITR 2	ITR 3	ITR 4	ITR 5	ITR 6	ITR 7	ITR 8	ITR 9
Biz / Functional Requirements	Home Page	Program Page (Static Page)	Resource Library	Clients	About	Breadcrumbs	QA / Bug Fixing	Begin Release 2
Set up Environments		Program Detail Page	Application Brochure	Program Finder (Dynamic)	About Us	Insets	Design Review & Updates	
Site Shell (Architecture)		Connect with Us		The Experience	History		Final UAT	
	Chinese Toggle	Focused Programs	Testimonials	Global Curriculum	Locations	Related Programs		
		Custom Programs	Participants	Program Structure	Life	Featured Resource	Final Updates	
	Chinese Translations	Comprehensive Leadership Programs	Objectives	Participant Engagement	Admissions	Info Graphic	Existing Site Freeze	
	Develop Taxonomy for Program Details	Curriculum		Employee Base	Requirements	Contact Page		
		The Experience	FAQs	Program Participants	Application Process	Brochure		
		Salesforce.com	Video Migration	Testimonials	Fees & Payments			
				Primary Navigation	Program Landing Page	Finalize Back End Admin Tool	Admin Tool Training	Support
					Campaign Landing Pages	Analytics		
					Program Comparison			

12/16 Cut Over
12/12 Code Freeze

Existing Content / Data Migration into new design

Administration Tool

QA / Bug Fix

Demo   Demo   Demo   Demo   Demo   Demo   Demo

Pre-Production

Set expectations

Business Requirements

Scope, LOE Assumptions , Budget & Schedule

Production

Manage expectations

Main Meetings

User Experience

Development

Review Feedback & Approval Loop

Obstacles
5 most common
3 hip pocket solutions

Site Architecture, Wireframes & Functional Requirements

Change Of Scope

Design, Develop & Integrate, Content Creation

Post-Production

QA / Bug Fixing & UAT

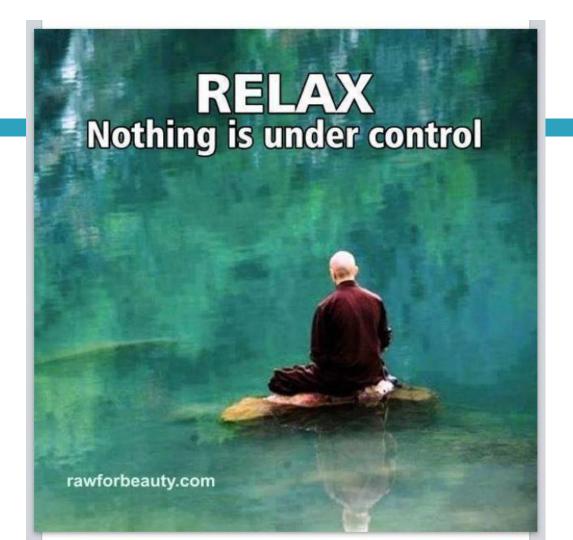Training

Deployment (Go Live)

Maintenance

Post Mortem

Production

- Manage expectations

- Obstacles
  - 5 most common
  - 3 hip pocket solutions
- Main Meetings
- Review Feedback & Approval Loop
- Change Of Scope

Managing Expectations

Expectations = Project Assumptions + Daily Team Status

The 5 Most Common Obstacles to Project Success

- *The requirements keep changing or are not approved in a timely manner*

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- *The Review, Feedback & Approval Loop is constantly delayed*
- *Deliverables, such as content or third-party assets, are delayed in delivery*
- *Communication is not consistent, it's broken or is missing altogether*

The 3 Hip Pocket Solutions to any Obstacle

- *You can add resources*
- *You can push the project delivery date*
- *You can move this deliverable or another deliverable to a later release*

Main Meetings

Main Meetings

- *Kickoff Meeting*

Main Meetings

- *Kickoff Meeting*

- *Daily Team Status Meeting*

Main Meetings

- *Kickoff Meeting*

- *Daily Team Status Meeting*

- *Weekly Client Status Meeting*

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- *Iterative Stakeholder Status Meeting*

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Main Meetings

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- *Working Group Meetings*

- *Milestone Meetings*

Rules of Thumb for your meetings
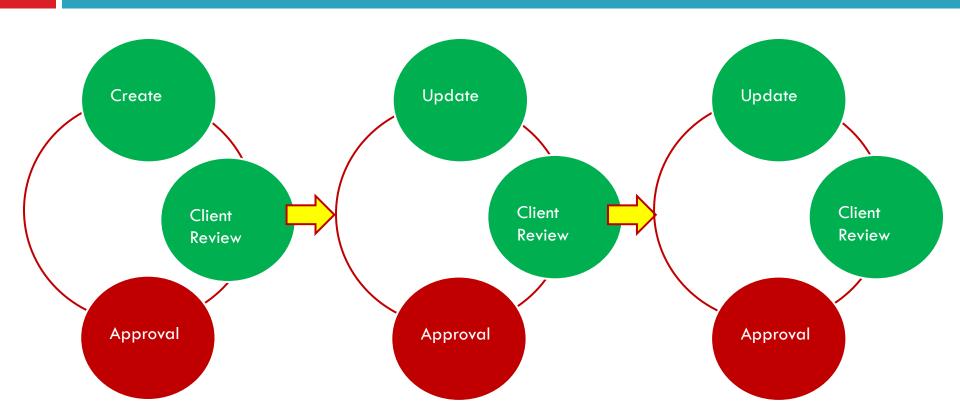
- Your team can't get anything done in meetings
- Keep your meetings short & to the point
- Don't invite the entire world
- You are a broker of information
- You cannot be everywhere at once, so don't try to be
- Send out notes afterward
- Schedule Milestone Meetings at the start of the project

Post Lunch Depression

The act of becoming a zombie or passing out altogether after having lunch.

Review, Feedback & Approval Loop(s)

Tweak-land

A world where only creative people go and when they come back they are usually very cranky.

Changes to Scope

- Changes occur because new ideas arise as the project progresses
- All changes can be accommodated
- All solutions must be vetted internally first
- All changes need to be documented

Tracking Changes to Scope

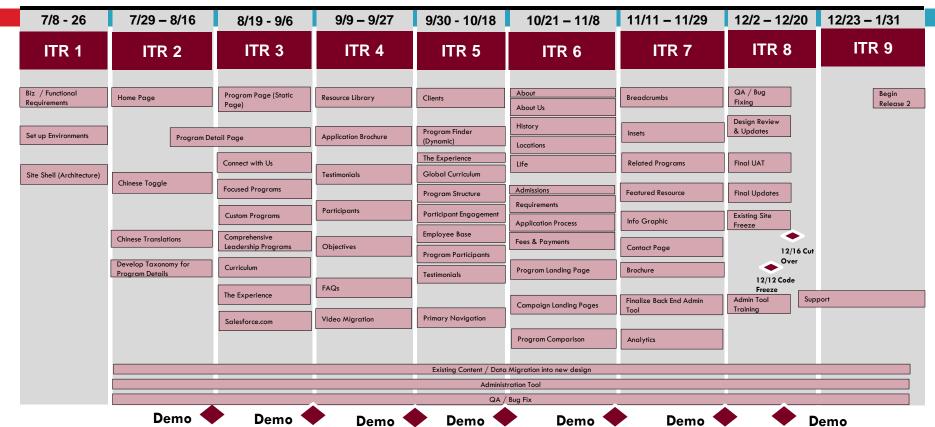| Requirement	Business Need or Description	Priority	Release #
Adobe Analytics Integration (possible R1 implementation)	A third developer will begin on the project on 8/12/13. There will be a team in place to support the live site during Christmas break (excluding the holidays)	P1	1 or 2
Right rail behavior on program detail pages	1. It would be nice to know what assets are 'hidden'. We have a business need to be able to select hidden assets for the right rail. However, for the most part, hidden assets are 'retired'. 2. I'm not sure if it is possible, or what the 'indicator' would be, but I'd like to consider this as an enhancement for a future release. I know we have asked for specific sorting for launch (of course, I can't find the email with the column order right now.)	P1	2
Shadow Box	Requirement 1.1.11 "Shadow box should have the message text "The content seen on the page is both Chinese and English(in Chinese) with a 'checkbox' and message as "Do not show this message again (translated in Chinese)" appearing at the bottom.". Instead we can set a cookie so this message only goes off once every 30 seconds – need to build a custom pop up box from scratch to achieve this	P2	3
Asset sizes on Sidebars	1. When we have a page with vertical gray line between the left and right columns, there's some css that adds extra white space to the right of the line, so the content in the right rail doesn't bump up right against it. 2. The fix to this could take upwards of 2 days for development and has a high likely of creating regression issues. We'd like to push this fix to R2/3	P2	3
Resource Library Generic content page	1. Pull quote or fact in the blue box 2. Video inset is optional and displayed via Edit Page>select from asset list 3. Testimonial inset is optional and displayed via Edit Page>select from asset list 4. Article inset is optional and displayed via Edit Page>select from asset list 5. Need the flexibility to place the testimonial or video or image anywhere on the page, if not then should be placed as seen on the mockup	P3	3

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Site Shell (Architecture)	Program Detail Page				History			
		Connect with Us	Testimonials	The Experience	Locations	Related Programs	Final UAT	
	Chinese Toggle	Focused Programs		Global Curriculum	Life	Featured Resource	Final Updates	
		Custom Programs	Participants	Program Structure	Admissions	Info Graphic	Existing Site Freeze	
	Chinese Translations	Comprehensive Leadership Programs	Objectives	Participant Engagement	Requirements	Contact Page		
	Develop Taxonomy for Program Details	Curriculum		Employee Base	Application Process	Brochure		
		The Experience	FAQs	Program Participants	Fees & Payments			
				Testimonials	Program Landing Page	Finalize Back End Admin Tool	Admin Tool Training	Support
		Salesforce.com	Video Migration	Primary Navigation	Campaign Landing Pages			
					Program Comparison	Analytics		

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ITR 1
- Biz / Functional Requirements
- Set up Environments
- Site Shell (Architecture)

ITR 2
- Home Page
- Toggle
- Program Detail Page
- Chinese Translations
- Develop Taxonomy for Program Details

ITR 3
- Program Finder
- Program Detail Page
- Search – Facets Program Finder
- Resource Library
- Salesforce.com Static Pages

ITR 4
- Program Finder
- Program Finder Right Rail
- Program Finder Widget
- Integration of taxonomy / metadata
- Connect with Us
- Focused Programs
- Custom Programs
- Curriculum
- Leadership Programs
- Data Migration
- 9/16-18 Photo Shoot

ITR 5
- New Requirements Program Finder
- The Experience
- FAQs
- Bug Fixes on Program Details & Program Finder
- Data Migration – New Fields, Import Sub Pages & Migration Script
- Resource Library
- 9/30 Admin Tool Training
- 10/8-9 Photo Shoot
- 10/15 IT Backup Restore
- UAT Begins (ITR 2 – 4)
- QC of metadata / taxonomy / search

ITR 6
- New Requirements & Updates Based on Steering Committee
- Clean Up & Implementation of Share -Point Best Practices
- Testimonials
- Admin UI Upgrades / Picture Imports (Framework)
- Implementation of new tagging tool
- Program Landing Page
- Program Comparison
- 10/29 Admin Tool Training
- 10/25 Final Photo Delivery
- 11/4 Final Content Delivery
- UAT (ITR 2 – 5)
- 10/22 & 25 IT Backup & Restore
- 11/1 IT Backup & Restore
- 11/12 - All Staff Demo

ITR 7
- New - Existing & Additional Req's - Detail Landing, Testimonials, Etc.
- About
- What is Inc.?
- History
- Locations
- Campus Life
- Admissions
- Requirements
- Application Process
- Fees & Payments
- Outage Forms
- Campaign Landing Page
- Request Brochure
- UAT (ITR 2 – 6)

ITR 8
- Complete Program Finder
- New - Additional Requirements from Admin Tool FAQs
- New Page - Generic Content Page – Test., Podcast, Interviews, Video
- Forms – Opt Out & Custom Inquiry, Lead Gen, Download PDF
- FAQ's Requirement Updates
- Employees
- 12/31 Cut Migration
- QC Taxonomy / Metadata
- Mobile Search Implementation
- UAT (ITR 2 – 7)
- 12/3 Admin Tool Training

ITR 9
- QA / Bug Fixing
- Final Content Entry
- Analytics: Integration of Net Insight or Adobe Code
- Video Server Implementation ?
- 2/11 IT Initial Planning Mtg
- 1/31 Final Content Migration
- 1/21 Admin Tool Training
- 1/21
- Final UAT (ITR 2 – 8)
- Adobe UAT
- Existing Content /Data Migration

ITR 10
- 2/19 Existing Site Freeze
- 2/13 UAT, QA & Dev. Cut - Off
- 3/5 Fail Over & Regression
- 3/5 Go Live
- Cut Over Process
- 2/17 - 28 Planning Activities & Collection / Restore Activities

Ongoing Iteration QA / Bug Fix on all defined Browsers

Demo **Demo** **Demo** **Demo** **Demo** **Demo** **Demo**
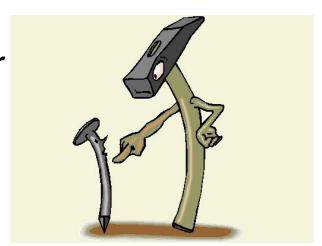
The Hammer

Someone in a senior role and who holds sway over your team, your client's team or another party responsible for a particular deliverable. The Hammer is able to get people to focus and get back to work.

Pre-Production

Set expectations

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Manage expectations

3 Main Meetings

Review Feedback & Approval Loop

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Change Of Scope

Post-Production

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Postproduction

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- QA, UAT & Bug Fixing
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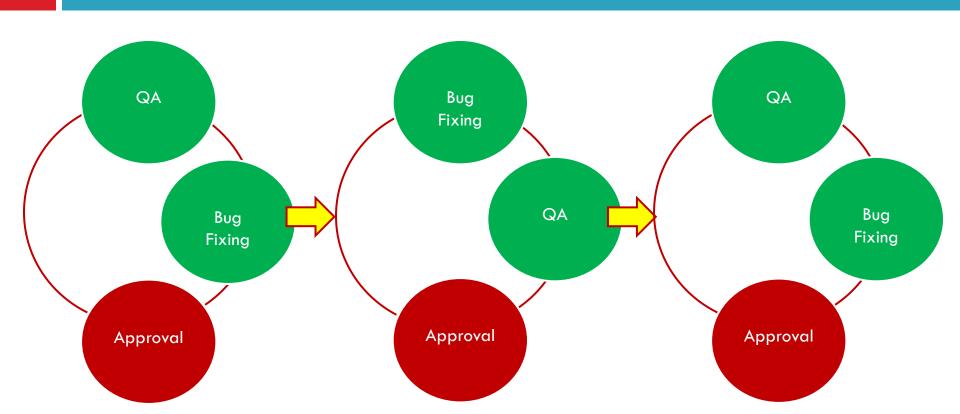
QA

"You want QA on that wall, you need QA on that wall."

Jack Nicholson

"A Few Good Men"

QA / Bug Fixing Loop

Rules for User Acceptance Testing

- *You can't go to UAT with buggy code*
- *Impacts the Client Relationship*
- *Not all code needs to have UAT*
- *UAT may have loops as well*
- *Train the Testers on how to conduct UAT*

Post Mortem

□ *Contrary to its name, a postmortem is used to breathe life into your account or the next project*

Post Mortem

Planning

- Were the group goals clear to you?
- Were the marketing goals clear to you?
- Were the development goals clear to you?
- How complete do you think the planning was before the actual commencement of work?
- How could planning be improved?
- What recommendations would you make for the planning process for the next release?

Resources

- How can we improve our methods of resource planning?
- Were there enough resources assigned to the project, given the schedule constraints?
- What could have been done to prevent resource overload?
- Do you think resources were managed effectively once the project started?

Post Mortem

Project Management/Scheduling
- Was the schedule realistic?
- Was the schedule detailed enough?
- Looking over the schedule, which tasks could you have estimated better and how?
- Did having a series of milestones help in making and monitoring the schedule?
- What were the biggest obstacles to meeting the scheduled dates?
- How was the project progress measured? Was this method adequate? How could it be improved?
- Was contingency planning apparent? How can we improve our contingency planning for the next release?
- How could scheduling have been done better or been made more useful?
- What would you change in developing future schedules?
- How were changes managed late in the cycle?
- Were the trade-offs between schedule and features handled well?

Post Mortem

Development/Design/Specifications
- Were there issues in the functional design and ownership?
- Were there issues in the architectural design and ownership?
- Were there issues involved in using components or with code sharing? How could this be done more effectively?

Test
- Were there issues in test interaction?
- Were there issues in test case design and coverage?
- Were there enough testers?
- Was the quality of the product we shipped acceptable?
- Did we work well with all of the testers?

Learning's

Information learned during the project that you incorporate into the process on the fly.

Deliver on Expectations

Success = On Time & On Budget

Success = A happy client who takes ownership of the final deliverable

Thank you