

# The Tao of Project Management

It's Not About The Tools

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# WHO IS THIS FOR?

- 1) **PROJECT MANAGERS:** No way. I would never have guessed!
- 2) **BUSINESS OWNERS:** How do you build a great PM team, anyway?
- 3) **DEVELOPERS:** Good PMs will make your life easier, not harder.
- 4) **POTENTIAL PMS:** Know what you're in for.
- 5) **SALESPEOPLE:** Yes, you could stand to have a process too.

# AGENDA

- 1) **BACKGROUND:** What do we know, anyway?
- 2) **PROFILING:** What should a PM look like?
- 3) **SELF PROCESS:** To successfully manage projects, first manage thyself.
- 4) **SKILLSET:** You might want to know some stuff, too.
- 5) **CHARACTERISTICS:** Can successful project management be taught?
- 6) **PROJECT MANAGEMENT CORE:** A quick look at the dreaded PMBOK.
- 7) **COMPANY PROCESS:** The really nebulous but important part.
- 8) **TOOLS:** Okay, now talk tools!

# BACKGROUND: TALKING TOOLS

Basecamp is the only way to go.

But New Basecamp Sucks!

Google Apps is all I need.

MS Project? Gross!

What's your to-do app? Trello? Evernote? Google Tasks?

We've got Drupal - let's build something custom!

Omniplan or Plandora?

I can't decide between Flow, Wrike, Apollo, and Copper.

Lighthouse is too simplistic!

Is Jira the best ticketing system?

Pivotal Tracker is better IMHO.

Webex! No, Gotomeeting! No, Fuze Meeting!

Asana or 10,000 ft?

What do you track time with?

The best tools do not make a project manager successful.

# BACKGROUND: TALKING TOOLS

It's time to elevate the discussion around web project management. Let's move beyond tools.

# BACKGROUND: WHAT DO WE KNOW?

## Who are we?

We've been successful project managers, we've managed successful project management teams, and we know Drupal.

## Why should you listen to us?

We want to make you better at your jobs, help you find the right project managers, and be more effective in delivering great Drupal projects for your clients.

# PROFILING: THE PERFECT WEB PM

## Project Manager Self-Process

- Practice makes perfect

## Project Manager Knowledge

- It never hurts to have tech hobbies

## Project Manager Traits

- Were you born for this job?

# SELF PROCESS

Every project manager is different.

The successful self process of one PM, when followed to the letter by another PM, will likely fail. Find a workflow and process that works for you.

Whatever you do, just have a self process!

It should entail...



# SELF PROCESS: EFFICIENCY AT THE CORE

## Key Skills

- Communicate briefly
- Batch everything
- Have a to-do list
- Regulate your workload and take regular steps back
- Create checklists

# SELF PROCESS: EFFICIENCY AT THE CORE

## Ask Yourself

- How could you get things done faster?
- Does everything on your to-do list really need doing?
- Are you the best person for the task?
- If you could type at 60WPM with 100% accuracy or 120WPM with 95% accuracy, which would you choose?

# SELF PROCESS: MAKE EVERYTHING ACTIONABLE

## Key Skills

- Always have a meeting agenda
- Take to-dos for everything
- Stay at inbox zero
- Live the GTD lifestyle
- Break down large tasks into smaller, actionable ones
- Use time logging increments

# SELF PROCESS: MAKE EVERYTHING ACTIONABLE

## Ask Yourself

- How are clean and actionable your meeting notes?
- What are you going to get done in the next 15 minutes?
- How many emails per day do you receive that are “junk”?

# SELF PROCESS: COMMUNICATE. THEN COMMUNICATE MORE!

## Key Skills

- Over-communicate if unsure
- Be repetitive if necessary
- Avoid large blocks of text
- Communicate problems and risks early
- Show people what you're working on!

# SELF PROCESS: COMMUNICATE. THEN COMMUNICATE MORE!

## Ask Yourself

- Did that email really need to be five paragraphs?
- If the client wants to know one thing today, what is it?

# KNOWLEDGE

You can be a great PM but ultimately fail at a web dev shop.

Here are some things to know...

# KNOWLEDGE: KNOW YOUR TECHNOLOGY

## Drupal

- Core Functionality
- Vocabulary & Terminology
- Common Modules
- Administration Menu



# KNOWLEDGE: KNOW YOUR TECHNOLOGY

## High-Level Concepts

- Hows and whys of a CMS
- Server-side versus client-side
- The hosting stack
- Domain names and DNS
- Version Control

# KNOWLEDGE: KNOW YOUR TECHNOLOGY

## Software

- Photoshop/Creative Suite
- MS Office/Google Docs
- Browser Testing

# KNOWLEDGE: KNOW YOUR TECHNOLOGY

## Code

- HTML/CSS
- PHP/MySQL
- Unix

# KNOWLEDGE: MARKETING AND NETWORKING

## You might want to know:

- How to network without looking like a tool
- Content strategy, SEO, social media, and other buzzwordy things
- Brand identity (company and clients)
- Target market and target customer (company and clients)
- Competition (company and clients)
- General client business objectives

# KNOWLEDGE: SELL LIKE A PRO

Be knowledgeable of:

- Estimation processes
- Your company's proposal formats
- Your company's product offering
- Your company's sales pipeline

# CHARACTERISTICS

You're not going to like to hear this, but it may be that your brain isn't wired for project management.

Project managers are a special breed...

# CHARACTERISTICS: MEMORY



# CHARACTERISTICS: MEMORY

- Great short-term memory is crucial
- Great Long-term memory is important, but can be aided with tools and process
- Information sponges and that person who is unfathomably good at trivia nights can make for good PMs



# CHARACTERISTICS: CAPACITY (NOT JUST EFFICIENCY)

- The ability to handle complete chaos on a grand scale
- Everyone has their own breaking point - Obviously from a business standpoint, more is better

# CHARACTERISTICS: WILLPOWER

- The ability to persevere and push through difficult situations
- Willpower is a limited resource – the more you have, the more sheer willpower you can throw at getting things done

# CHARACTERISTICS: RAPID SINGLE-TASKING

- Note: NOT the same as multi-tasking
- Switch between tasks with zero ramp-up time
- Be able to flow like a developer working in code, but with constant interruptions

# CHARACTERISTICS: PRIORITIZATION

- There will always be more work to do as a PM
- The ability to leave things undone while knowing that everything that needs to be taken care of IS taken care of

# CHARACTERISTICS: INTRINSIC MOTIVATION

- You can't (efficiently) manage a project manager's project for them
- Being highly efficient at high capacity is draining without motivation

# CHARACTERISTICS: LEARNING ADDICTS

- A thirst for knowledge ensures engagement with company and client
- A requirement to survive around highly technical development teams
- A big part of good project management is learning from failings
- Never repeat the same mistake twice

# CHARACTERISTICS: EMPATHY?

- Does too much empathy cause too much stress?
- Does too little empathy cause frustrated clients?
- Does middle of the road empathy just lead to a middle of the road PM?

# CHARACTERISTICS: ~~EMPATHY~~ EMOTIONAL INTELLIGENCE

- High emotional intelligence is a must, regardless of empathy
- A good PM may or may not feel for the client, but maintains distance to focus on the best overall solution for a customer



# CHARACTERISTICS: MORE CONFIDENCE THAN CALLED FOR

- Raise the right alarms to the right people, but otherwise inspire confidence in your team
- Communicate assertively with the client. You're the expert – that's why they hired you
- When in doubt, fake it till you make it

# CHARACTERISTICS: JUST ENOUGH RISK

- There are situations that call for begging for forgiveness rather than asking for permission
- Critical analysis is needed to identify the biggest area of risk on a project and reduce it
- Make decisions on tradeoffs – if the timeline is at risk, you're probably going to have to put the budget at greater risk to improve the timeline

# CHARACTERISTICS: STRATEGY

- Make the right calls in high-stress situations on the fly without enough information
- Be able to reset expectations
- Intuitively understand how to manipulate outcomes without manipulating people
- Identify project intangibles and read stakeholder personalities to identify hidden risk and ensure customer satisfaction

# PROFILING

So how do you lasso this magical unicorn?



- Be picky
- Interview thoroughly
- Ask the right questions
- Fire fast if you get it wrong, or await eventual implosion

# PROJECT MANAGEMENT CORE

Okay, you have great project managers. That's the first step.

Next up...

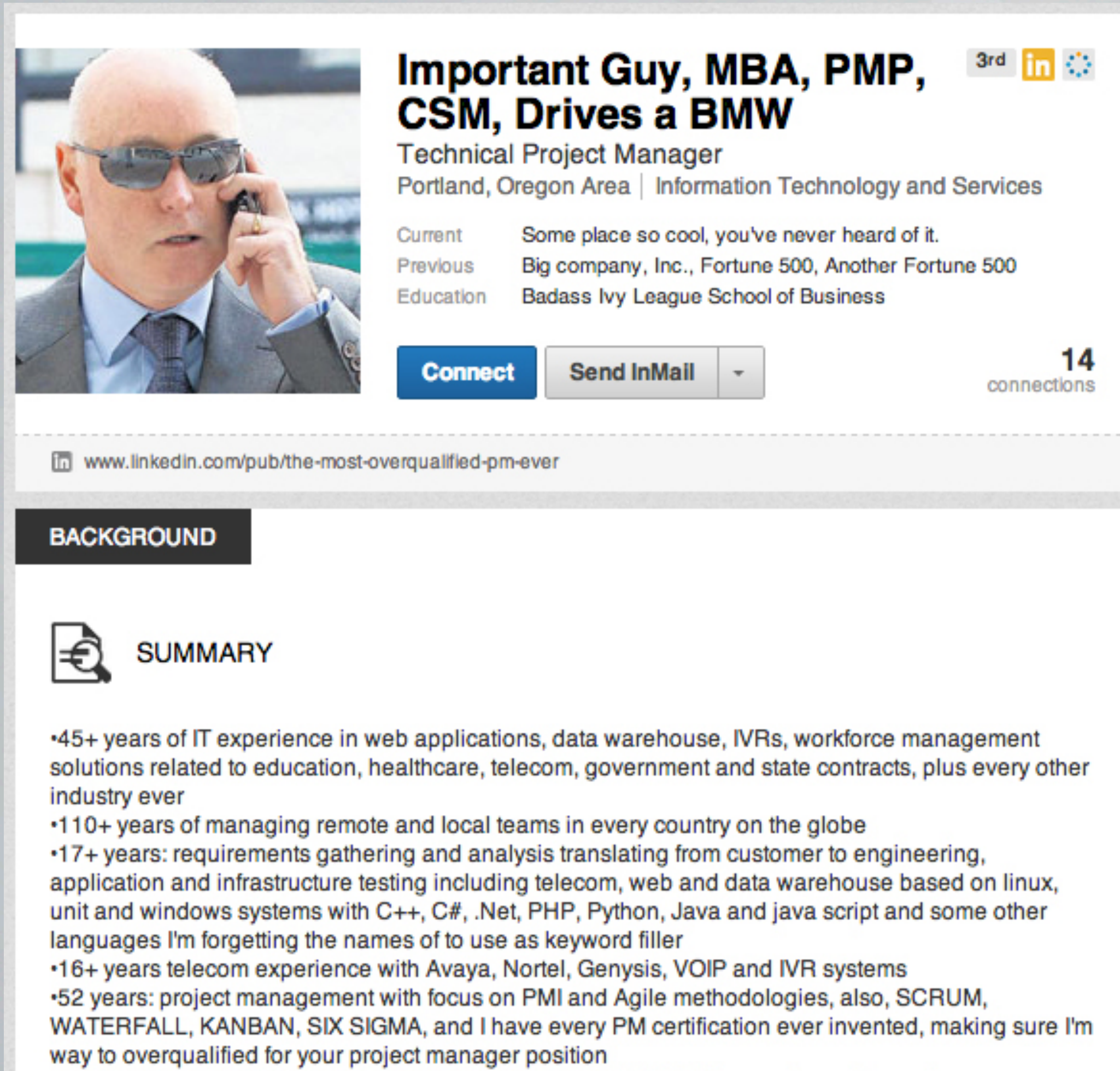
# PROJECT MANAGEMENT CORE



PM is not:

PM is:

- Integration
- Scope
- Time
- Cost
- Quality
- HR
- Communications
- Risk
- Procurement

\*Yes, this is PMBOK



**Important Guy, MBA, PMP, CSM, Drives a BMW** 3rd  


Technical Project Manager  
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Current Some place so cool, you've never heard of it.  
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**BACKGROUND**

 **SUMMARY**

- 45+ years of IT experience in web applications, data warehouse, IVRs, workforce management solutions related to education, healthcare, telecom, government and state contracts, plus every other industry ever
- 110+ years of managing remote and local teams in every country on the globe
- 17+ years: requirements gathering and analysis translating from customer to engineering, application and infrastructure testing including telecom, web and data warehouse based on linux, unit and windows systems with C++, C#, .Net, PHP, Python, Java and java script and some other languages I'm forgetting the names of to use as keyword filler
- 16+ years telecom experience with Avaya, Nortel, Genysis, VOIP and IVR systems
- 52 years: project management with focus on PMI and Agile methodologies, also, SCRUM, WATERFALL, KANBAN, SIX SIGMA, and I have every PM certification ever invented, making sure I'm way to overqualified for your project manager position

# PROJECT MANAGEMENT CORE: INTEGRATION

## Resourcing

Allocate the right resource to the right projects based upon technology needs.

## Have a Plan

How are you going to execute and track progress? What do the steps involved look like?

# PROJECT MANAGEMENT CORE: SCOPE

## Features and Requirements

Discovery time: fleshing out a signed proposal, determining the exact features and more, all while keeping the budget in check!

## Documentation

Write a technical specification every time! No excuses.



# PROJECT MANAGEMENT CORE: TIME

## Schedule and Milestones

Allocate appropriate time based on scheduled resources, other projects, and managing the client's schedule. Then hold people to it.

# PROJECT MANAGEMENT CORE: COST

## Budget and Hours Allocation

Refer to your project plan. Make sure every task has an estimate. Understand the how and why of those estimates. Then track against them carefully.

# PROJECT MANAGEMENT CORE: QUALITY

## Quality Assurance

Is the project feature complete? Does it match specifications? Does it work?  
Has it been tested by humans? Machines? Hamsters?

# PROJECT MANAGEMENT CORE: HR

## What Makes People Tick?

Know the skillsets of your team and how to apply them to the project. Understand how to motivate them and keep them on track. Figure out how they flow.\*

\*Note: This is hard, and complicates process

# PROJECT MANAGEMENT CORE: COMMUNICATIONS

## Communication

Talk to the right people at the right times. Tell them what they need to hear, but don't overload them with information. Give them the information they need to get their job done. Use persistence and sheer willpower following up to help them get things done.

# PROJECT MANAGEMENT CORE: RISK

## Identifying Risk

There are sure-fire warning signs of risky projects. Identify risk early with checks put in place by your process. Is the client flaky or inconsistent? Do you have high-demand resource on your project? Do the estimates convey a good understanding of the scope of work? Did the salesperson botch the sell?

# PROJECT MANAGEMENT CORE: PROCUREMENT

## Get The Stuff You Need

Does your team have all the resources needed to complete your Drupal project? If not, help procure wireframes, copy, designs, 3<sup>rd</sup>-party resources and documentation, etc.

# COMPANY PROCESS

That sounds like sheer chaos. *My brain hurts!*

No wonder people call PM a dark art. But don't overthink things...



# COMPANY PROCESS: AGILE, WATERFALL, AND YOU

You have a few choices when it comes to web dev methodologies:

- Waterfall
- Agile
- Scrum
- Lean
- XP (Extreme Programming)
- The new Agile spin-off that's all the rage
- Your process, which is likely some amalgamation of the above

Oh, how to choose...

# COMPANY PROCESS: THIS MIGHT SOUND FAMILIAR

Every organization is different.

The successful process of one company, when followed to the letter by another company, will likely fail. Find a workflow and process that works for your company.

Whatever you do, just have a process!

It should entail...

# COMPANY PROCESS: IT'S LIGHTWEIGHT

- It should provide just enough structure and organization to get things done without feeling burdensome
- Put the majority of the process burden on project managers

# COMPANY PROCESS: IT'S ACCEPTED

- Buy-in is key – without it, your process won't be adopted or adhered to by your team!

# COMPANY PROCESS: IT'S INTEGRATED

- Get all departments using the same integrated workflow and communication channels
- Tie project management's role to every department
- Treat internal projects and stakeholders like external ones

# COMPANY PROCESS: IT'S EVOLVING

- You're never done defining your company's process – don't get too comfortable
- Regularly reevaluate and modify process to align with company goals, organization size, and staff changes
- Identify the weakest part of your process and rebuild it to be more effective

# COMPANY PROCESS: IT'S FLEXIBLE

- Your process should not be set in stone – every project is different
- When you break your process, having process in the first place allows you to identify how and why you're breaking from the norm
- Progress before process – simpler solutions are great!

# TOOLS

Great project managers? CHECK. A Solid process? CHECK.

Great! Now you're cleared to talk tools...



# TOOLS: A MAGIC BULLET?

There is no perfect tool. If there was, it'd be out-of-date every time you modify your process.

## Tools must:

- Support your process (not the other way around)
- Cause less work, not more

## Tools should:

- Match the complexity of your process
- Focus on providing high-quality reporting

When in doubt, spreadsheets!

**QUESTIONS?**

**THANK YOU!**