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@allisonmanley
#PMTheMusical

Project Management: The Musical!

palantir.net

Hello!
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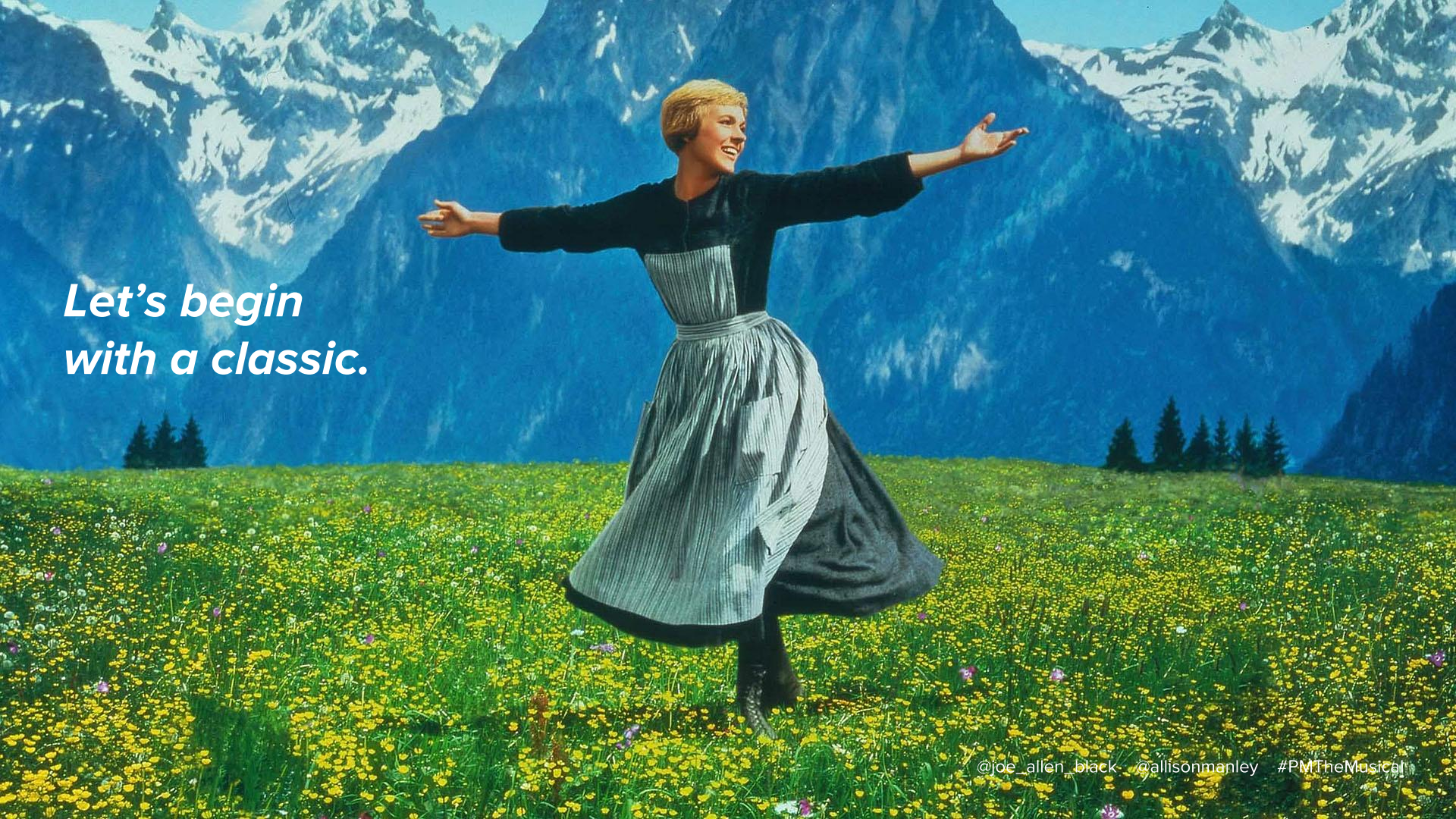
Let's begin
with a classic.
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Contracting

Scope

You must spell out the scope.

Cost

Define the payment terms

Dates

You’re unavailable.

Clear

Deliverables list.

Clarity

On exclusions.

Signatures

From higher-ups.

Tea

(Hey . . . not everyone likes coffee.)

Know know know the scope!

(PS: you'd better know the scope.)

Know the contract!

+ Deliverables
+ Scope
+ Exclusions
+ Assumptions
+ Schedule
+ Payment terms

Get Organized
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Internal Tools

+ Redmine / JIRA / etc
+ Risk Log
+ Timetracking
+ Communication tools – like a group email address
+ Google folders

Organize the internal team

+ Roles and Responsibilities
  + Who is in charge of the overall vision?
  + Who is in charge of user stories?
  + Who creates the sprint schedule?
  + Who manages demos vs releases?
+ Resourcing

Any other considerations?

+ End-to-end project
+ Higher Education client
+ Six team members total
+ The client is out for a conference
+ One team member on vacation

Cowboys!!

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Kickoff!

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Purpose of a Kickoff

+ Define goals
+ Gain consensus
+ Learn and listen
+ Empower teams
+ Manage expectations
+ Identify risks
+ Collaborate

Set the agenda

+ Determine which meetings you need.
+ Get the right stakeholders in the room.
+ Solidify travel plans
+ Plan exercises to get to the core of what client needs.
+ Make time for a team dinner/drinks.

[CLIENT NAME] Onsite Agenda

For onsite notes, click here

DAY ONE: Monday, Month XX	**Description**
10:00 am - 12:00pm	Tour of [facilities / campus / location]
12:00 pm - 1:00pm	LUNCH
1:00 pm - 3:00pm	Kick-off Workshop
3:00 pm - 3:30pm	SCRUM / BREAK
3:30 pm - 5:00pm	Target Audience user stories
DAY TWO: Tuesday, Month XX	
9:00am - 10:00 am	Branding / Marketing Information
10:00 - 10:30 am	SCRUM / BREAK
10:30 - 12:00 pm	Editorial / workflow user stories
12:00 - 1:00pm	LUNCH
1:00 - 2:00pm	Search requirements
2:00 - 3:00pm	Hosting information / Infrastructure
3:00 - 3:30 pm	SCRUM / BREAK
5:00 - 7:00pm	All team drinks/dinner at [RESTAURANT]
DAY THREE: Wednesday, Month XX	
9:00am - 10:00 am	Calendaring / Events
10:00 - 11:30 am	Integrating Teams
11:30 - 12:30	Content Migration requirements
12:30 - 1:30pm	LUNCH
1:30 - 3:30pm	Prioritization / recap workshop

Purpose of Meetings

With the onsite meetings, we begin the discovery phase of our work together. The onsite agenda is intended to streamline knowledge sharing between our teams, encourage direct participation by all parties, and establish standard protocols for efficient use of Palantir services.

We will:

- Envision project success
- Establish priorities with project stakeholders
- Explore design & development goals and criteria through facilitated discussions
- Empower teams with an understanding of project process at each phase

Editorial & Workflow User Stories

Tuesday 10:30 am – 12:00 pm

Attendees:

- [NAME]
- [NAME]
- [NAME]
- [NAME]

Facilitator: [NAME]

Draft outline:

- 15 minutes: Review current workflow
- 10 minutes: Introduction to strategies around editorial workflow & the use of Drupal and Workbench as tactical tools to meet editorial requirements
    - Note: Intro for tactical tools is first in order to give some background for Kroc to understand options they may not have known they have.
- 15 minutes: User story generation around Editing and Workflow
- 15 minutes: User story sharing and refinement, prioritize
- 20 minutes: Add acceptance criteria to highest priority stories

--- LUNCH ---

Search requirements

Tuesday 1:00 – 2:00 pm

Attendees:

- [NAME]
- [NAME]
- [NAME]
- [NAME]

Facilitator: [NAME]

Draft outline:

- 10 minutes: Define the various roles involved in searching the site and what their desired actions are (including a discussion of roles defined in previous research.)
- 10 minutes: Introduction to strategies around Search & the use of Drupal, Facets, and Search APIs
- 10 minutes: Discuss past research, current search system, what works well, and what does not.
- 30 minutes: User story generation around search

Yul Brenner!
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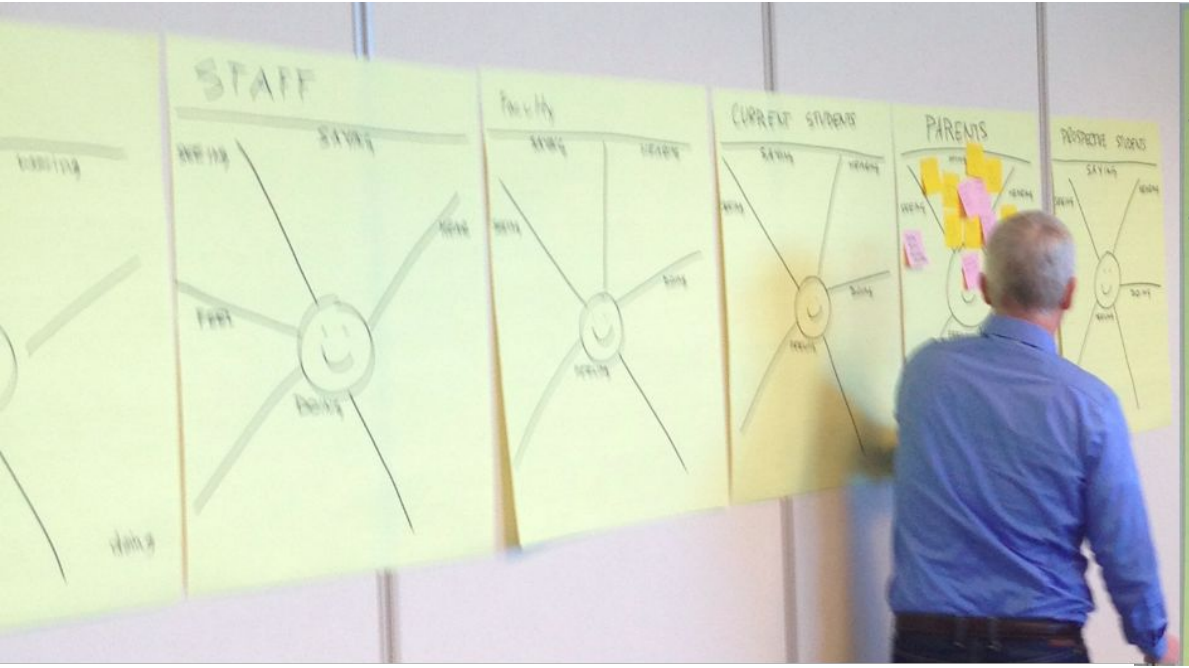
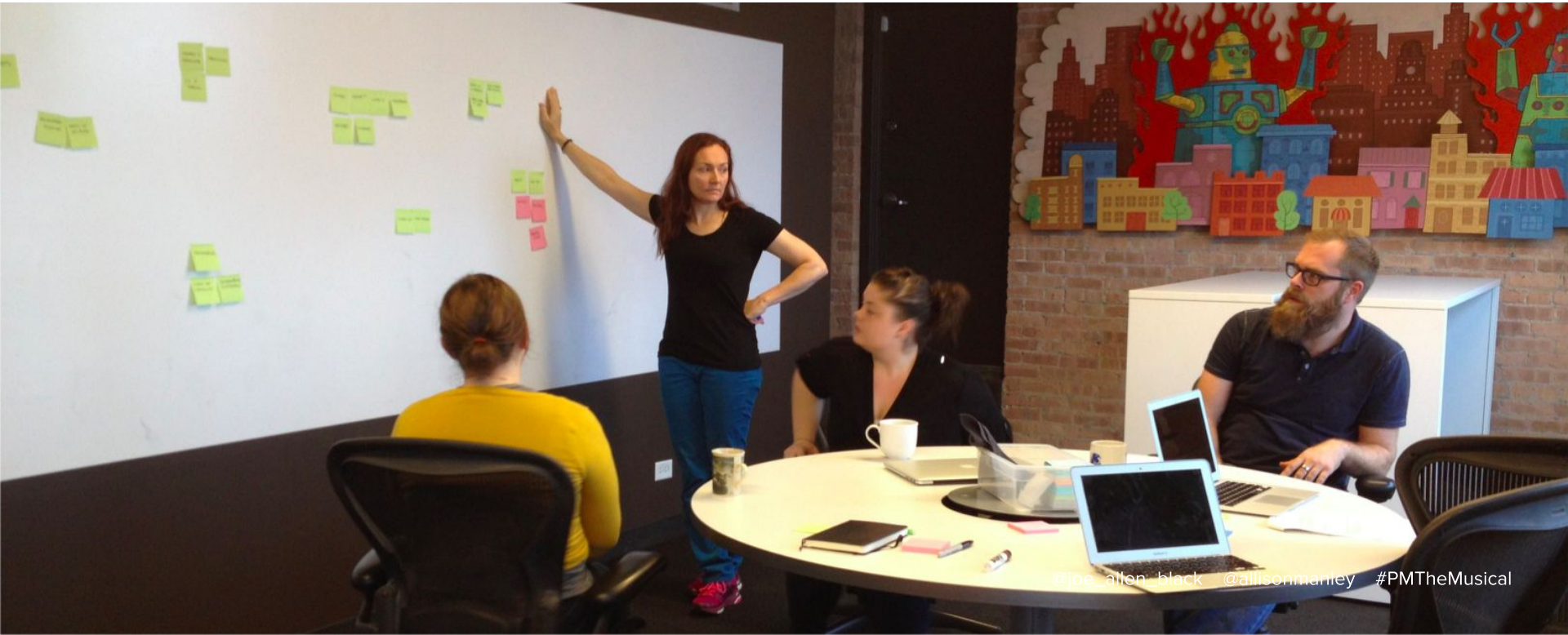
Empathy Mapping



Information Architecture



The best projects are collaborative

+ Where can we collaborate?
  + Content Strategy?
  + Design?
  + Development?

Witches!

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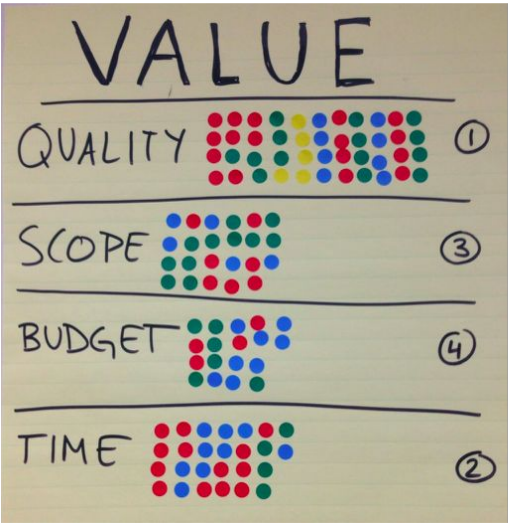
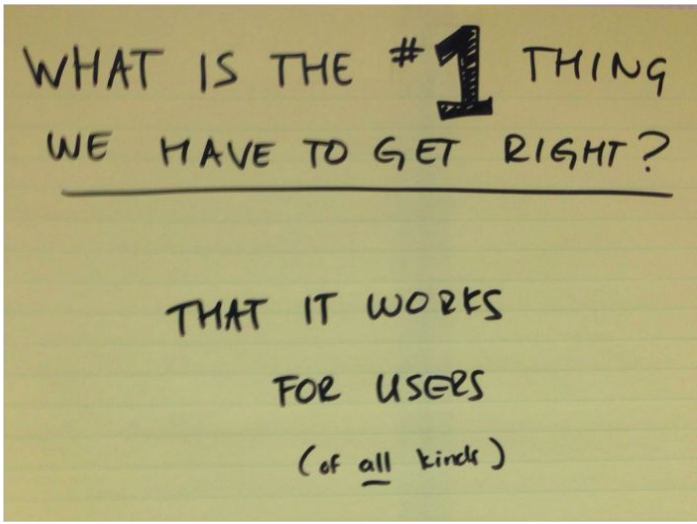
Wrap It Up





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Dictators!
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Strategy &
Discovery Phase
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Team tasks:

+ Content Strategy:
  + Audit the content
  + Taxonomy
  + User mapping
  + Content types
+ Analytics / Data:
  + Google Analytics
  + Usability testing / surveys
  + Past research
+ Foundational development work
  + Build Spec
  + Foundational development

PM Tasks:

+ Helping the team gather data
+ Analyze feedback from client
+ User testing planning
+ Unblock everyone
+ Keep things moving!

Key Performance Indicators (KPIs)

+ Applying online
+ Signing up for campus tours
+ Filling out financial aid forms
+ Paying their bill
+ Registering for an event or class
+ Higher organic search

NYC bohemians!

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Design Phase

Team tasks:

- Style Tiles:
  - These are not layouts!
- Design Concepts
  - Wireframes
  - Static comps
- Design Prototypes
  - In the browser, using HTML/CSS

PM Tasks:

+ Scheduling presentations with client
+ Collecting feedback from client
+ Unblocking everyone
+ Keeping things moving!

Uh-oh . . . stakeholder disapproval!

Julie . . .
she's everywhere.
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Intermission!!
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Development Phase
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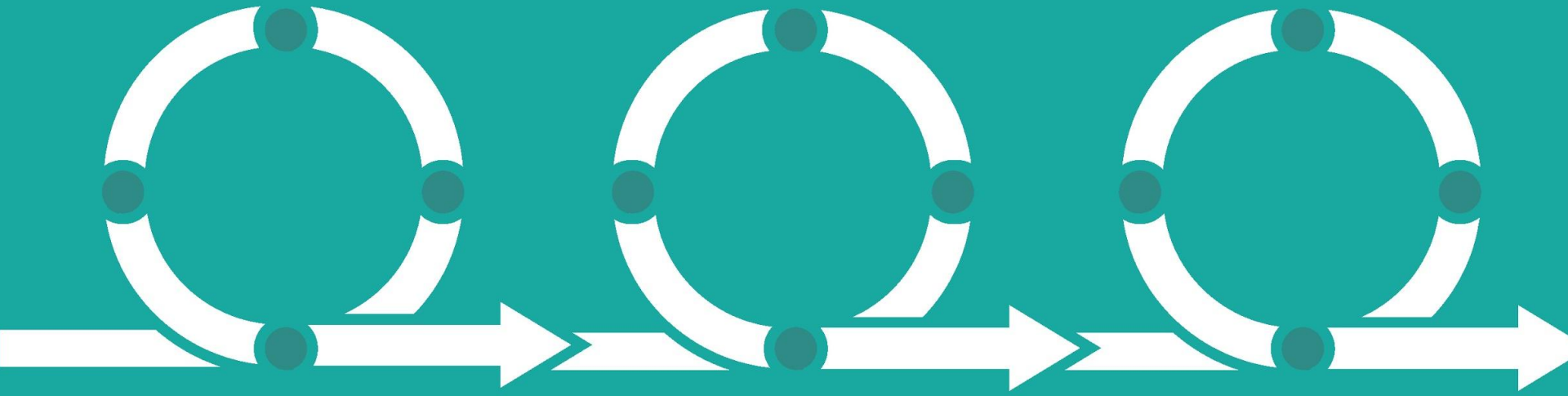
Agile Process



Team tasks:

- Sprint planning:
  - Assigning points
  - Assess options for the client
  - Help prioritize and set dependencies
- But, mostly — they create the site
  - Build
  - Testing and Quality Assurance (QA)
  - Deploy

PM Tasks: Managing Sprint Schedule

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
WEEK 1	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development
WEEK 2	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development	**MEETINGS:** Daily Scrum (15 min) **TASKS:** Design / Development Feature Freeze: 12:00 pm	**MEETINGS:** Demo Dry Run (45 min) Demo (45 mins) Retrospective (30 mins)	**MEETINGS:** Backlog grooming (1 h) Sprint Kickoff (1 h)

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Client tasks:

+ Set acceptance criteria
+ Prioritize value
+ Perform internal demos
+ Participate in daily meetings

Uh-oh . . .

Scope creep!

(C'mon, you knew we'd go there.)

Deadline is approaching!

+ Managing toward the most valuable product
+ Managing expectations
+ Looking ahead toward support or account management
+ Working with Marketing for potential case study

Get well soon!
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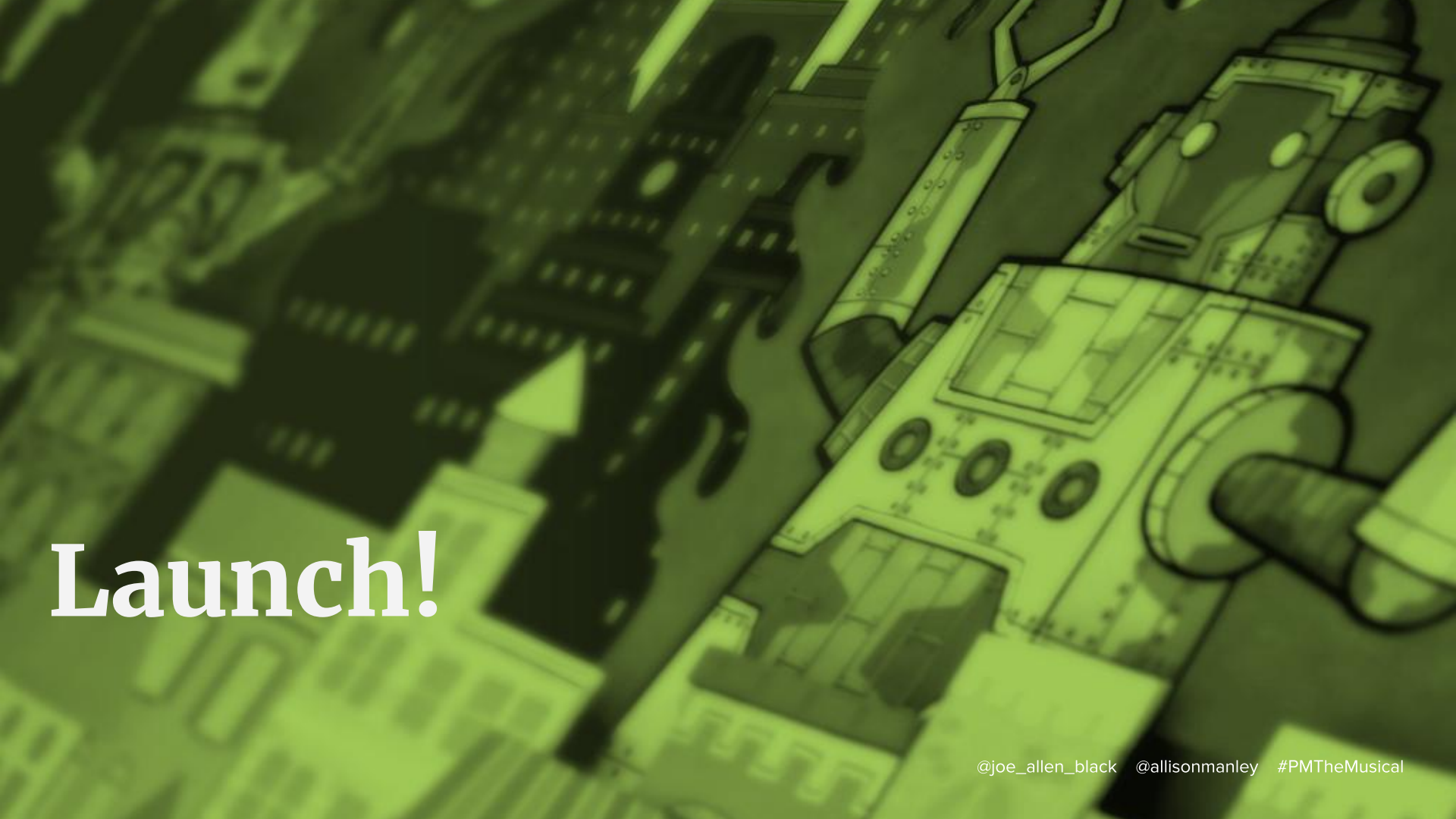
Launch!
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CATS!
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Retrospective

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What is a retrospective?

+ What went well?
+ What could be improved?
+ How does this inform the next project?

Again . . . CATS!
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Stay in touch!

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Hello!
(OK, not from a musical. But . . .)
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Goodbye!
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Encore! (aka: Resources)

+ Blank agenda
+ Risk log
+ Content Audit

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