

## QUESTION: “Can you take me through a project, from beginning to end?”

### ANSWER:

#### ASSESSMENT OF RFP OR RFI

The request should be deemed finically, culturally, and/or politically advantageous. *Is this going to be good for us?*

#### LOI

Once the project has been agreed upon internally, a Letter of Intent should be sent to the client indicating the agency’s wishes to take on the project. *Yes, let’s go.*

#### KICKOFF

Any and all within the Agency are invited to a meeting where the client and the project are introduced. This meeting may involve the client and may include a short brainstorm of blue-sky ideas. These early thoughts and impressions often prove to be the most authentic and valuable. *Let’s all get excited.*

#### MSA

The Master Services Agreement should summarize the nature and terms of the relationship between Client and Agency. The details of this document may include Delivery and Approval procedures, IP ownership, payment, NDA, and early termination conditions. *Here’s how we’re going to do this.*

#### DISCOVERY (OPTIONAL)

Bigger projects as well as projects that have not been clearly defined in the mind of the client (AKA “we don’t know what we want” projects) may require a preliminary “discovery” period. This may include internal brainstorming sessions, client workshops, or market research. I would write a separate budget and SOW for Discovery. *What does it all mean?*

#### PROJECT SCOPE

I would work with the team to synthesize the client goals into specific deliverables and then estimate a length of time required for each (in hours). *Undercommit. Overdeliver.*

#### BUDGET

Informed by the scope, the budget should document the cost and the fees for the project. Factors may include employee bill rates, budgeted hours for all team members, margin goal, any contingency margin, 3<sup>rd</sup> party costs and fees, and expenses. *Dollars and sense.*

#### BUDGET APPROVAL

The budget should be approved by the Agency principals before being included in the SOW. *Are we making enough money?*

## SOW

The SOW serves as the container for all of the project's agreements. This includes the project summary, goals, deliverables, a rough schedule (start and end dates), and invoicing terms.

The summary should explain the business context of the project. The goals should be actionable ("increase unique metrics by 10%" not "make the site prettier"). The deliverables should be specific and include version numbers ("two (2) Look and Feel directions") and be split up into disciplines (strategy, IA/UX, design, development, QA, and production).

The SOW should also include project assumptions such as, "The client will provide assets in .ai and .psd formats" and "Any feature or function not included in the Wireframes will be considered out of scope." Assumptions are the thick boxes drawn around the deliverables. When push comes to shove, assumptions are the lines in the sand. The final SOW is signed by both Client and Agency. *Here's the plan, Stan.*

## SCHEDULE

The schedule will timeline all work in days, deliverable due dates for both Agency and Client and client review periods. The internal schedule may detail every team member and their work on specific sections of the project while a separate client facing schedule may simply outline client deliverables (assets, copy, decisions, etc.) and the launch date. Agency should either add this schedule to the SOW and then have client resign or get a separate signature from the client. *Always know what comes next.*

## DO THE WORK

When the work actually begins, a project manager's job is to smooth the processes of Strategy, UX/IA, Design, Development, and QA and to make sure the scope is adhered to. While the team is doing the work, the project manager should facilitate communication among the team members and serve as the conduit between the team and the client (traditionally an account manager function). This can include anything from scheduling meetings and writing contact reports to gauging morale and ordering pizza for late nights in the office. *Be the grease.*

Certainly, this section could go on for pages but here are the main project manager duties that come to mind:

- Keep the project on schedule
- Keep the project on scope
- Keep the project on budget
- Minimize "scope-creep" by understanding and managing the client's expectations
- Keep a running list of "nice-to-haves" that may be the fodder for the post-launch COS
- Know a modest amount about every nook and cranny of the project. A project manger should know why the developer used JAWS instead of Wordpress or why the designer used TypeKit to pull in a beautiful script face instead of using Verdana.
- Let the client know how things are going without allowing your team to feel like someone is looking over their shoulders
- Shield the team from the client's drama, indecisiveness, and inconsistencies
- Organize deliverable delivery
- Keep a finger on the morale of the team
- Constantly keep an eye out for better ways of getting things done
- Partition a portion of your brain to work around the clock to monitor the every need of your team: practical, technical, logistical, and emotional

## COS (OPTIONAL)

For an infinite number of reasons, it may be necessary to change or amend the original SOW after the project has been kicked off (typically after the project is finished). This should be communicated formally through a Change or Scope document which, similar in format to the SOW, details any changes or additions to the deliverables, schedule, assumptions, or payment terms. *Can I interest you in dessert or should I bring the check?*

## POST-LAUNCH CHECKLIST

After the project is launched, the project manager should run down a checklist of to-dos that may include:

- ✓ Is this project eligible for any awards?
- ✓ Should this project be the subject of a case study?
- ✓ Where should we promote this project? How?
- ✓ When can we announce the launch of this project?
- ✓ Should we do anything special for the client? (dinner, gift, hand-written letter)
- ✓ Should we do anything special for the team?

## BUDGET ACTUALIZATION

This is an opportunity to compare the final cost of the project to the project costs described in the budget. Going over budget or coming in under budget are equally unattractive: overspending is just as bad as cheating the client out of a top-quality product. Ideally, actualization reports are compiled on a weekly basis during the project so that potential red flags can be highlighted before they mature into financial problems. *So, did we enrich our wallets?*

## AFTERMATH

After the project is wrapped and the client is on their happy way, it is helpful to sit down as a team to discuss the outcomes of the project. The observations and conclusions that come out of this meeting can then be used to better prepare for the next project. *So, did we enrich our craft?*

Topics may include:

- What went well?
- What didn't go well?
- What were our favorite parts of the project?
- What were our least favorite parts of the project?
- What could we do better next time?