



# Managing Your Projects (and Yourself) to Success

Susan Fennema  
Chaos Eradicating Officer  
**Beyond the Chaos**



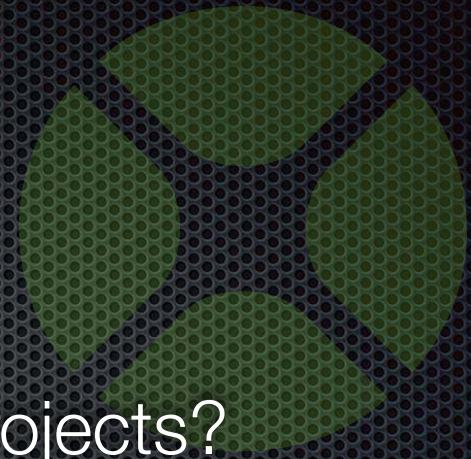
# Howdy Y'all!



- Non-technical, non-certified project manager, but technology lover
- Texan and Texas A&M Aggie, class of '88 (whoop!)
- Home chef
- How I eat Smarties®
- Wife of a mechanic, mother of 2 cats & an almost 2-year dog
- Daughter of an entrepreneur; small business fan



# Enough about me...



- How many of you struggle with **finishing** projects?
- Any problems managing scope?
- Get pulled in multiple directions and not know what to work on next?
- Do you work with subcontractors, other team members or have people to delegate to?
- Wish you had a way to keep things organized?
- Do you waste time justifying your hours?
- Is your business running you? Or are you running it?



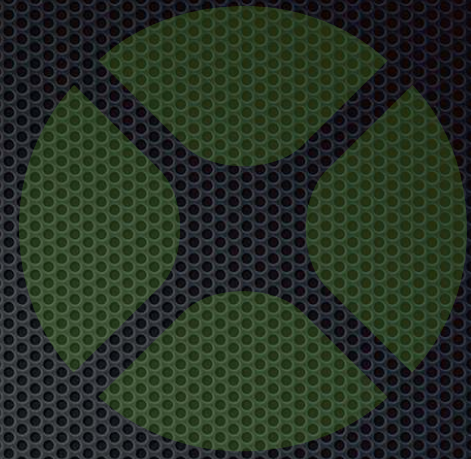
# Solving the Root Problem



- All businesses have the same challenges
- Don't add bureaucracy, add structure
- Basics
  - Policy (multiple-person teams)
  - Process & Procedure
  - Project Management
  - Interruption Management



# Policy vs. Process vs. Procedure



- Policy = rules for multiple people
- Process = system
- Procedure = checklist



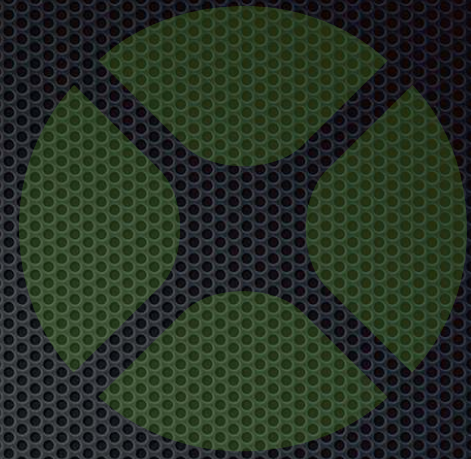
# Processes

- Why are they needed?
- Repeat your successes
- Stop reinventing the wheel
- Start delegating





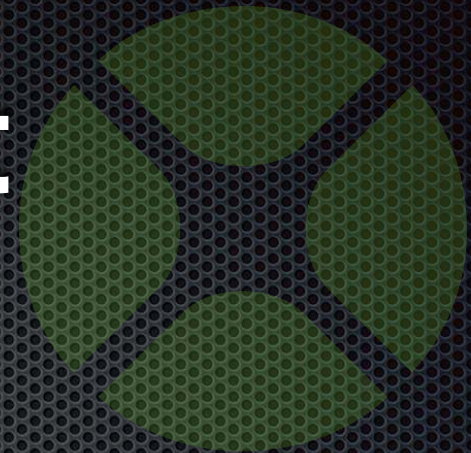
# Minimum Processes



- Sales
- Invoicing/getting paid
- Projects
  - Opening
  - General structure with milestones
  - Closing



# Project Management Tools



- Repeat after me, “Email is not a project management tool!”
- Basecamp or other software adds structure to projects
- Weekly status meetings
- It starts with the proposal!



# Project Management Tips

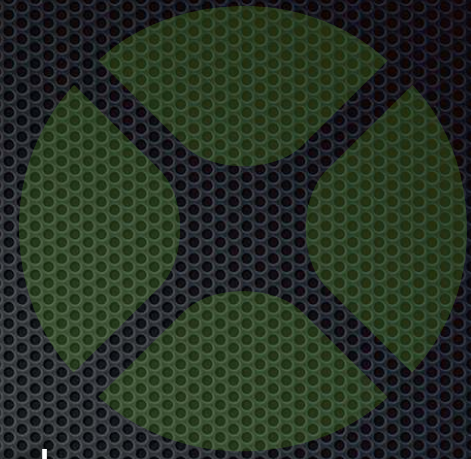
(Basecamp, for example)

- Each client needs its own project
- To-dos need dates/deadlines
- To-dos need a person responsible
- Include milestones, rather than setting deadlines for each individual task
- Get a professional to build your structure/template





# Milestone Setting



- Start when project is due and build backward
- Or, schedule forward if no date is required
- Meet the deadlines, or communicate in advance
- Include the major steps in the process
- Share the schedule with the client when you start
- Modify vs. the client's and team's schedules



# Changes

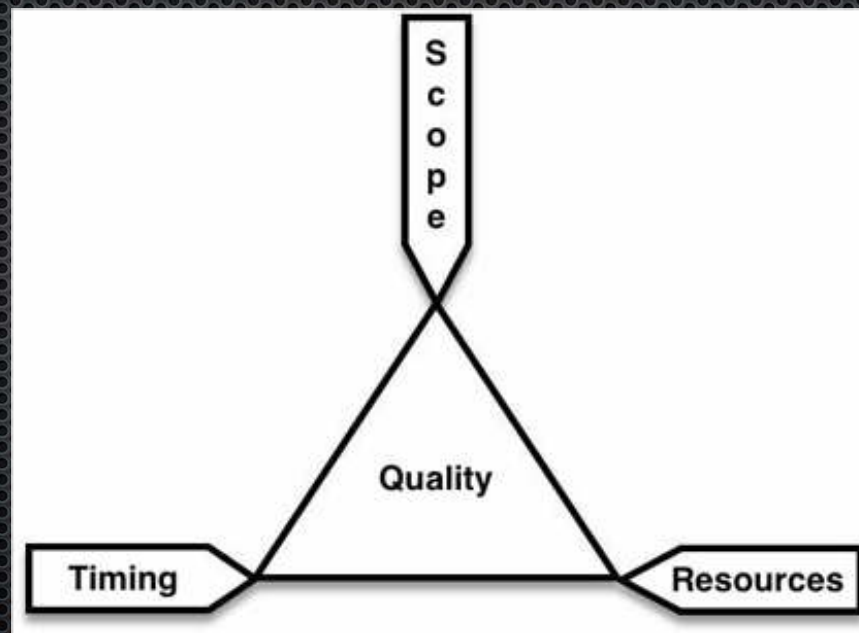
- Don't let changes get you off track
- An undelivered project has NO value
- Fulfill the scope first; then address changes
- Stop and talk about dramatic changes
- Consider issues beyond control





# Managing Client Changes

- The Triangle of Truth
- Learn this word: “NO!”
- But, what’s a nicer way to say it?





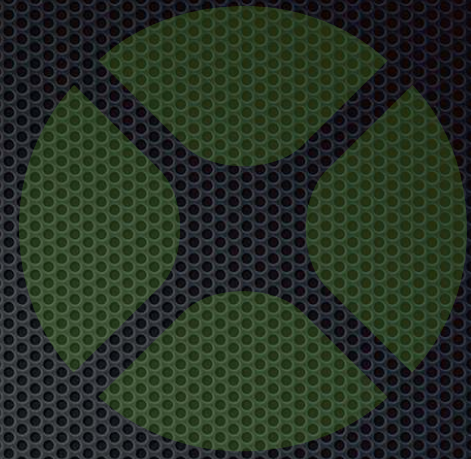
# Set Client Expectations



- The scope is the scope.
- Timeline is based on scope.
- Changes affect the price.
- Clear communication with consequences to your clients.
- Give clients a way to dream! (Wish List)



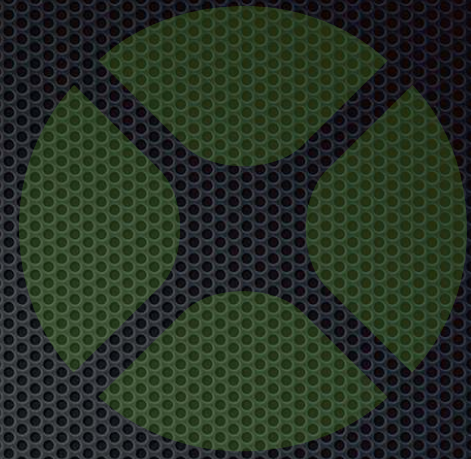
# Wish Lists Results



- Your next project is built off the wish list
- Change Orders
  - Individual or groups of tasks
- Change Buckets
  - Money on deposit
  - Good long-term support option



# PM Yourself



- Create a project for your business
- Keep operations tasks, with due dates, assigned to you in that project
- Block out time on your calendar
- Look at to-do list at the end of each day vs. tomorrow's calendar
- BE REALISTIC!



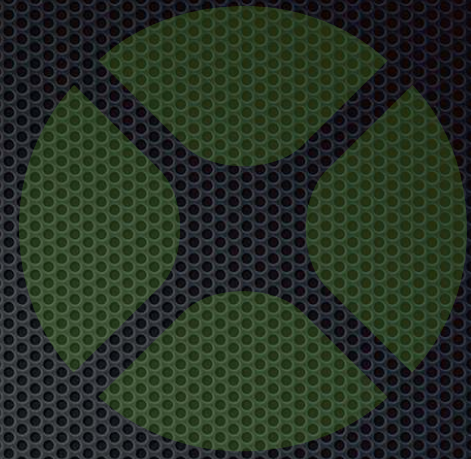
# Managing Interruptions



- Deciding what can wait is easier if you have a plan
- Overwhelmed? BACK TO THE LIST!
- Knock out simple things quickly, when possible
- Mitigate bigger interruptions
- What's your most common interruption?



# Managing Email



- Schedule when to go through it
- Decision making is key!
- Respond, File, Junk, Flag, Delete
- Empty inbox after every review
- Schedule outgoing emails; set up automatic responses
- Product like Mail Butler (on Mac) to schedule



# Stop Selling Your Time

(a little about value pricing)

- Value Pricing is prioritizing the outputs for your client rather than your inputs
- Your time = input; who cares?
- The solution = client output; the thing that saves them or makes them money





# VP Benefits

## for Your Business

- No more time tracking
- No more sending an invoice and ducking
- The money conversation is out of the way, so you can focus on the value you are creating for the client
- It forces you to want projects to stay within scope.
- Not sold? Try a fixed price project first.
- Resource: [www.artofvalue.com](http://www.artofvalue.com)





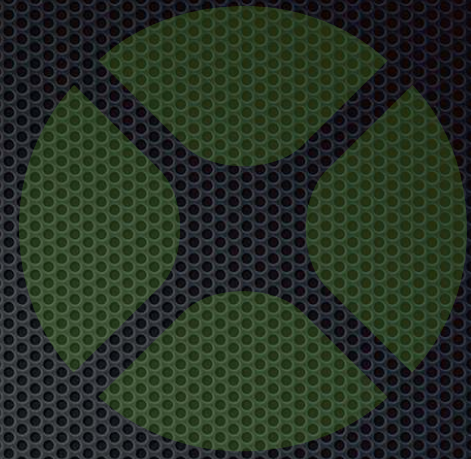
# Recommended SaaSes



- Basecamp
- Highrise
- Grammarly for Google Chrome
- Calendly
- HelloSign / Adobe Sign
- Quickbooks Online / Freshbooks
- More at: <http://beyondthechaos.biz/saas-tools/>



# Q & A



Susan Fennema

[susan@beyondthechaos.biz](mailto:susan@beyondthechaos.biz)

Because you attended my session, I have a killer offer for you when you contact me before the end of October! Mention code XDC2016 and you get a free initial consultation (a \$300 value).

Give us feedback on this session in the XDC app!