



Project Management Solutions

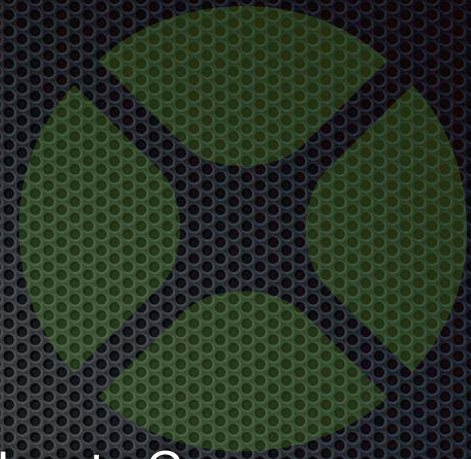
Susan Fennema
Chaos Eradicating Officer (CEO)
Beyond the Chaos, LLC

About Me



- Non-technical, non-certified project manager
- Technology lover
- Home chef
- Daughter, sister and best friend of small business owners

Enough about me...



- How many of you struggle with finishing projects?
- Any problems with scope creep?
- Get pulled in multiple directions and don't know what to work on next?
- Are your projects running you?
- Or, are you running them?

Starting with the Proposal



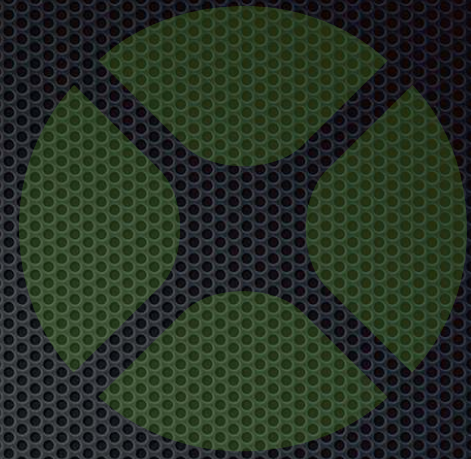
- Not more than 3 pages
- Define your scope clearly by what the client gets
- Present a deadline or a time frame
 - Duration \neq estimate hours
 - Client testing/acceptance can follow
- Clarify budget & payment terms
 - Estimated number of hours? Fixed price?

Payment Terms

- Defined in the proposal
- Upfront?
- Bank of hours?
- Staged payments?
- After acceptance?



Project Set Up



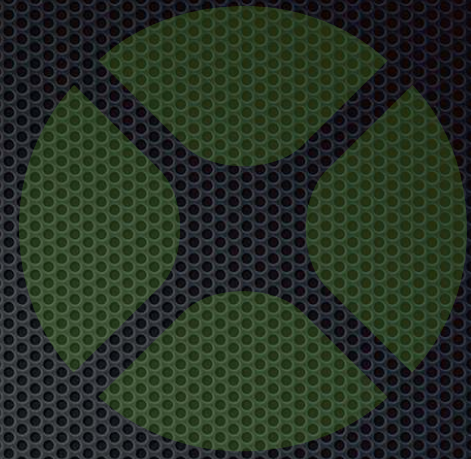
- Use project management software
- Start with a custom template
 - all the standard steps
 - no development tasks
 - how to install
 - licensing renewals, etc?
- From Discovery through Testing/Bugs

Schedule the Project



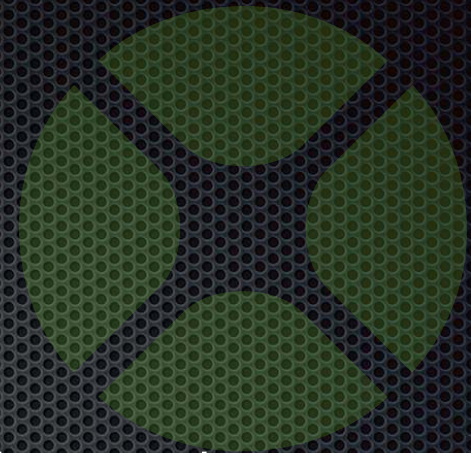
- Schedule the project - ALL OF IT
- Yes, including the bug/test period
 - Waterfall
 - Phased
 - Agile
- Calendar Time Blocking

Kickoff Call



- All the players should be in it
- Review the scope
- Discuss the milestones
- Verify people schedules (vacations, busy client periods)
- Schedule standing status meetings

Status Meetings



- Prescheduled, regularly, for the duration of the project
- Entire team is included
- Not intended for development conversations
- Discuss:
 - progress vs. milestone schedule
 - progress vs. budget
 - next steps
 - outstanding needs (file submission, etc)

Change Management



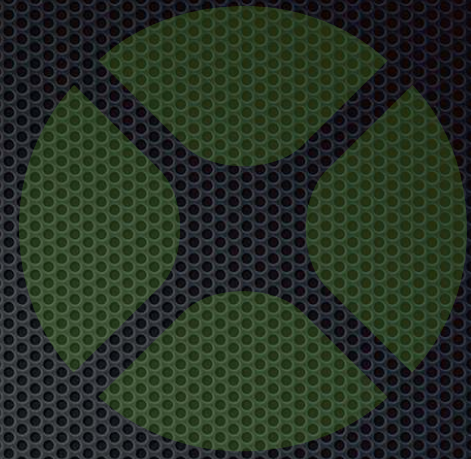
- How to prevent a project from going off the rails
- No PM can help if the communication isn't allowed by the owner/tech lead
- Story time
- Wish List
 - Someday/Maybe Dream List
 - Next Phase List

Manage Like You Mean It



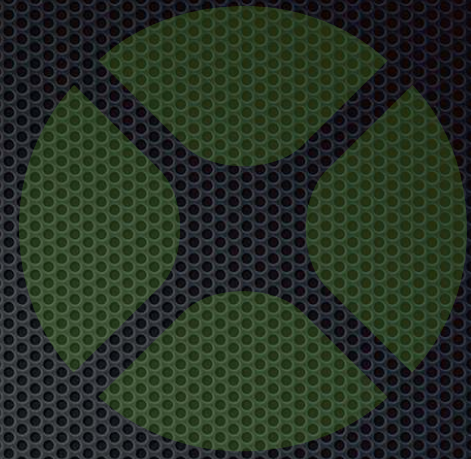
- You drive the project - the client doesn't
- Saying no
- Clear concise communication with consequences

Testing and Support



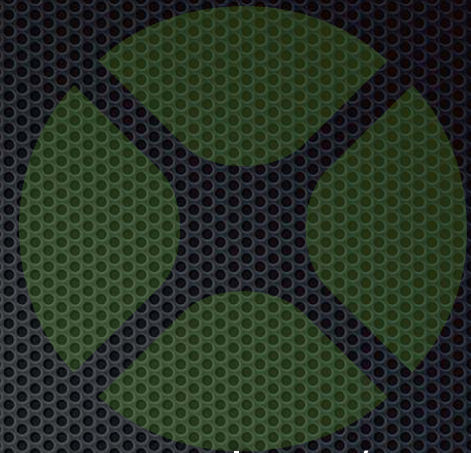
- Alpha testing
- Beta testing
- Bug fixes
- Ongoing Support
 - Do you have a tracker? (ZenDesk/Teamwork Desk)

Closing a Project



- Send a final invoice, if applicable
- SAY THANK YOU
- Create a quick help page or videos to explain how the solution works
- Check in about a month after they're using it (set a reminder)
- Ask for a testimonial/referral/reference/portfolio use
- Notify of PM software closure and how to reach you in the future

Special Offer



- Free month of coaching/support with custom template/process package
- Mention Code: XOJO2018, expires June 29, 2018

Q & A

Susan Fennema

susan@beyondthechaos.biz



Give us feedback on this session in the XDC app!