INTERACTIVE PROJECT MANAGEMENT

Pixels, People, and Process

Nancy Lyons and Meghan Wilker

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GEEK GIRLS GUIDE

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For our families: Laura and Merrick, and Jeremy, Trixie, and Theo, who patiently supported us as we worked long hours to finish the book. We couldn't have done it without you.

And to the past and current Clockworkers, the smart, talented, and invaluable guinea pigs that improved and fine-tuned our process.

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Nancy Lyons and Meghan Wilker

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New Riders is an imprint of Peachpit, a division of Pearson Education.

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ISBN 13: 978-0-321-81515-6
ISBN 10: 0-321-81515-7

9 8 7 6 5 4 3 2 1

Printed and bound in the United States of America

Acknowledgements

This book is the result of a huge effort by many people over a great amount of time. We've been lucky enough to work with amazing colleagues, partners, and clients over the years. Every project clarified our thinking—and our determination.

First and foremost, we have to thank **Chuck Hermes**, **Kurt Koppelman**, and **Michael Koppelman**. With Nancy, they founded Clockwork Active Media, where we shaped the vision and did the work that refined our thinking and process. That this book exists is a testament to their insight, trust, and dedication.

We'd also like to give a shout-out to the Clockworkers who directly contributed to the book: **Selah Ben-Haim**, **Ben Beuchler**, **Telari Bohrnsen**, **Mollie Clancy**, **Lloyd Dalton**, **Justin 'Dez' Dessonville**, **Dave Dohmeier**, **Ryan Evans**, **Matt Gray**, **Eric Hanson**, **Kjrsten Holt**, **Julie Horton**, **Matt 'Hank' Kiedrowski**, **Andrew Leaf**, **Ryan Loomis**, **Rett Martin**, **Kevin O'Brien**, **Eryn O'Neil**, **Michael Opperman**, **Ruth Rosengren**, **Whitney Shaw**, and **Luke Vestrum**. Special thanks and a high-five to **Micah Spieler**, who designed our gorgeous book graphics.

Reaching back into history, thank you to the clients, partners, and colleagues of Bitstream Underground, where we first started working together, and where the seed for this book was planted.

Thank you to **Amanda Costello** and the board of MinneWebCon who invited us to speak at the 2011 conference, and to **Kris Layon** for advice and guidance on writing a book and who, without our knowledge, went out of his way to invite his book editor to see us speak there. Thanks to said book editor, **Michael Nolan**, for showing up, liking what he saw, and inviting us on this book-writing adventure. Thank you to the extended team at Peachpit: **Margaret Anderson**, **Glenn Bisignani**, **Cory Borman**, **Gretchen Dykstra**, **Danielle Foster**, **Joy Dean Lee**, **Jan Seymour**, and **Charlene Will**. You shepherded the book through to completion and thoughtfully made it a reality.

Thank you to **Julie Allinson** and **eyebobs**, who named a pair of eyeglasses after us (!!!) and let us use them on the book cover.

To our early readers—**Jamie Jacobsen**, **Margaret McInerny**, and **Mahtab Rezai**—whose critical feedback was helpful and whose pats on the back were appreciated. And thank you to **Tiger Beaudoin**, who let us use his picture as our representative client; lookin' good! And much appreciation goes out to **Jesse James Garrett**, who allowed us to adapt his seminal illustration for the book.

Thanks to the vibrant Minneapolis interactive community. We're grateful to be a part of it.

It's impossible to write a book about project management without being managed, and really, the only person that could manage us is **Lyz Nagan**. Thanks to her for the gentle (and sometimes not-so-gentle) nudges, late night emails, and all-day meetings. Not to mention spending two days locked in a cabin with us.

Nancy: Do you mind if I say a personal thank you?

Meghan: Only if I can do the same.

Nancy: Of course, but you can't thank the Vampire Diaries.

Meghan: Why not? It helped me recover from some pretty tough chapters.

Nancy: Our work often takes us away from the people we love the most, and writing this book was no exception. With as much affection and gratitude as can be conveyed in words on a page, I want to thank my partner, **Laura**, and my son, **Merrick**.

Meghan: Yes. And thanks to my husband, **Jeremy**, for his support and encouragement. I'm grateful to have him as a husband and co-parent. Thanks also to my children, **Trixie** and **Theo**, for putting up with mama being away so much and for snuggling me tight whenever I'm home.

Nancy: Also, I know this might go without saying—but it shouldn't—I want to thank you, Meghan.

Meghan: Oh man, is this the emotional part?

Nancy: Yes, and you can't stop me. Work can be really intense and stressful, and we often get so busy that we use up our emotional and physical energy. But the thing that makes people—myself included—happiest at work is having a friend there. And, Meghan, you're the person that makes it easy and more enjoyable for me to do my work.

Meghan: Right back at ya, sister.

Preface

In our many years in the interactive industry, we've witnessed more than a few projects become train wrecks. It's happened in large and small advertising agencies, software companies, and digital agencies alike. Most of these wrecks could have been avoided.

In nearly every case, the problem was that nothing held the team together, which led to clashes between stakeholders. We've seen the client-side project manager who was relatively isolated try to manage the marketing and IT departments. Sometimes the IT department resented the marketing team over initiatives that IT felt they should either own or heavily influence. And other times the marketing team came to resent the IT department because IT controlled the product's delivery, and in doing so created a bottleneck.

We've seen creative professionals steamroll technologists, technologists ignore strategy, and strategists curb creativity.

We've seen companies hire freelancers specifically for their interactive expertise, without giving them the authority to guide the internal teams who needed help in the first place. And over the years we've met many leaders who didn't understand digital products or their medium-specific requirements, which left teams working in a vacuum.

And in these scenarios, no one was willing to say, "I don't know what's happening or what *should* be happening." Yet it's true. And under *any* of these conditions—let alone under *several* of these conditions—it's difficult to get anything done well.

What was the missing link? A well-understood process and effective project management.

A good process unites clients, leaders, teams, and project managers. It gives everyone a shared understanding, which is exactly what's needed to stay on track. Really, this book should be called "A Client, Leader, Team, and Project Manager's Guide to Avoiding Train Wrecks." But for some reason our publisher rejected that title.

Process, and project management, save the day

Projects fail because stakeholder expectations aren't met or promises are broken. But this is solvable. A good process makes people work better—and together. Effective project management means that the expectations and promises are established and realized.

A clear company-wide process means creative, strategic, and technological thinking can come together successfully. And a standard industry-wide process means that all stakeholders know what to expect and what to ask for.

What you'll learn

This is a guide to understanding and launching successful interactive projects. It's more of a how-to-think guide than a how-to-do guide. While we've included useful tips and advice throughout the book, the primary lessons are about how to approach people, tasks, stages, and phases within a project.

The first half of the book outlines the role of the interactive project manager and our approaches to project management. Both the role and approach focus on the people side of things. We discuss what it takes to be an effective project manager and how to navigate the often unpaved road from project initiation to launch. In these chapters, you'll see the words collaboration and communication a lot.

The second half of the book walks you through the project management methodology we use at Clockwork Active Media, the digital agency where we work. It illustrates how to apply the role and approaches discussed in the first half to an actual project. It establishes phases and deliverables that organize the thinking into actions.

No matter what environment you're in—a digital agency, an advertising agency, or an in-house marketing team—you can integrate our methodology. The tools and software you use are almost irrelevant; the important thing is how you *think* about and approach projects and people.

How we got here

Our process evolved from many aspects of our work. We looked at our successes (and failures) on past projects, observed how work was done in a variety of environments, and interviewed people in our own company—and at others. We pulled from existing models of project management and drew on prevailing ideas about work, culture, and people.

We asked questions like: What do clients, technologists, and creative teams need? What parts of projects tend to be challenging to clients and the internal team? How can we facilitate the best possible work as efficiently as possible (for both clients and ourselves)? Where is there value in existing methods, and where are there gaps?

Actually, we *keep* asking these questions to ensure that the process is still serving us well. The ultimate goal is to create work that's a perfect balance of quality and efficiency.

A common starting point

Before we continue, let's make sure we're all on the same page. (Wow. It's kind of fun to say that in a book. We actually *are* on the same page.)

We believe that a good process

- Serves people, doesn't thwart them
- Enables creativity, doesn't kill it
- Evolves constantly
- Is no substitute for thinking

Okay. If you're on board, read on.

Contents

Introduction

Interactive projects require a different approach and an industry-specific process. The challenge is complex: Interactive projects are chaotic by nature, yet some sense of order must be imposed. The key is a good process, and the key that is a focus on people.

From every angle, interactive projects are about people—the people who commission, design, develop, deploy, and use the end products.

The people side of projects requires full-team collaboration and effective communication. The project itself requires thoughtful planning and *many* lists outlining each and every feature. **All this, which may seem labor intensive, actually saves time and energy, and improves quality, success rates, and team members' and clients' satisfaction.**

Below are the mantras for tackling interactive projects. They give you a framework for thinking about and approaching the work, so your subsequent actions will be effective.

INTERACTIVE PROJECT MANAGEMENT

- Project managers think, analyze, communicate, and motivate.
- Interactive project management is a leadership role.
- A good project manager plans proactively, reacts appropriately, communicates actively, and observes vigilantly.
- Interactive project managers should be personable, detail oriented, naturally communicative, and active online.

PIXELS

- The interactive industry creates living products that are *used,* not consumed.
- Plan for change; technology is always evolving.
- Interactive products unite creative technology and technological creativity.
- The success of a product is measured by users' experiences with it.

PEOPLE

- Recognize and work with people's emotions, not against them.
- Care about your team, your clients, and your work.
- Be collaborative, open, clear, and thorough.
- Effective communication is essential: Think about what precisely needs to be communicated and the best way to deliver *that* message.

PROCESS

- Processes enable work, they don't obstruct it.
- The process isn't just for project managers—it's for everybody.
- Planning means greater freedom to find the *right* solution.
- Define what you're doing and why: Establish parameters and requirements; state goals and strategies.

About the authors

Nancy Lyons

Think strategically, act thoughtfully, be a good human.

Nancy works at the intersection of technology, community, and people. As a leader and technologist, she creates solutions that further community and business goals by meeting the needs of individuals. Her guiding philosophy is that a human-centered approach to technology is the only way to get results that make a difference. Problem solving is about empowerment: motivated people create good products. Nancy supports clients and teams by fostering a collaborative, idea-driven culture that nurtures creativity and brainpower.

Nancy is President/CEO of Clockwork Active Media, a leading digital agency specializing in designing and developing business solutions for web, mobile, and other digital environments. She speaks extensively about work culture, social media, technology, and leadership and has been locally and nationally recognized for her role as owner and CEO of Clockwork. Nancy serves on the National Board of Directors at The Family Equality Council.

Meghan Wilker

Meghan specializes in using strategy, technology, and process to bring people and products together. Her public speaking, writing, and outreach guides individuals and businesses to develop smart digital products. Whether she's managing a team or mentoring students, she believes that technology creates endless opportunities to make life easier and to produce meaningful connections. She empowers users to proactively engage with the web by being aware, educated, and attentive and spearheads dialogue that drives evolution within the interactive community.

Meghan is the VP, Managing Director at Clockwork Active Media, a digital agency specializing in designing and developing business solutions for web, mobile, and other digital environments. She's a contributing writer at GTDtimes.com, and was named as a "Woman to Watch" by the Minneapolis/St. Paul Business Journal.

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COMMUNICATION

Right message. Right medium. Right time.

There are countless ways to communicate with team members and stakeholders, from email and documents to meetings and calls. An effective project manager wrangles all that *can* be said in *any number of ways* into what *needs* to be said and delivers it in the *best way possible*.

In this chapter, we'll discuss

- What good communication looks like
- The common types of communication and what they're good for
- Best practices

All projects require communication. What's different about interactive projects? There's a wide range of personalities and stakeholders involved—from the IE6-hating developer to the executive requesting "the next Facebook." Not only that, there are opinions, requirements, restrictions, and requests coming from all of them.

All of this causes tension. Effective communication is the key to preventing and resolving the tension and misunderstandings that arise.

Using emotional intelligence to understand your team is just the beginning. Applying those observations and experiences using communication is pivotal to facilitating productive and collaborative engagement among your team.

What does good communication look like?

Practicing good communication, at every opportunity, will make a huge difference on any project. Transferring information, exchanging ideas, providing explanations, and achieving goals all rest on effective communication. As project manager, you set the stage by ensuring that communication has the following four qualities:

OPEN. Being honest about expectations, objectives, and restrictions is one of the most crucial elements of successful communication. You might have to ask a lot of questions to get a client to be open, or maybe you'll have to reiterate the value of openness to your team. Bring back-channel conversations to the forefront and stress to your team that openness strengthens the project.

CLEAR. Understand what's going on with your team and the client. And make sure they understand, too. Listen, ask questions, process, and think through what they're saying. And confirm understanding with others, both clients and the internal team.

COLLABORATIVE. Collaboration requires productive, two-way communication. Both you and the client bring expertise and value to the project. They know their business; you know yours. Together you make something great. Don't try to make your client feel like you know everything about everything, because you don't—and neither does your team, your department, or your organization. And make sure that your client doesn't treat you or your organization like vendors. Your team does more than simply execute clients' ideas; it brings value and insight, an asset that your client must recognize if you're going to work collaboratively.

IT GOES TWO WAYS

Project managers are responsible for communicating clearly *and* facilitating good communication among the other team members. Watch out for possible miscommunication as email exchanges and conversations happen.

USE A COMMON LANGUAGE

There's marketing speak, tech speak, admin speak, industry speak, and more, plus a million dialects of each. There are many ways that stakeholders talk about problems, solutions, and everything in between. Always think about how to speak in jargon-free terms.

THOROUGH. Communication is an invaluable tool in properly documenting and recording the life cycle of a project. Capturing the thinking and talking that happens apart from forms and documents is important in establishing a shared understanding among the team. Recognizing that a project is veering off course requires thoroughness: Read carefully, ask questions, call out red flags, and then document and communicate the changes.

The effects of good communication extend beyond the project and into the life of the product. Think about this when managing a project. From beginning to (no) end, effective communication will mean success beyond the launch date.

REVISIT DOCUMENTATION

Check meeting notes, scratch paper, or any place where you might have jotted down a task, decision, or requirement. Make sure that critical information gets transferred from temporary notes to more permanent documentation.

Setting the stage for success

Prepare the team for the kind of communication that will arise and the potential problems that communication can solve.

Welcome candid conversations

Not all news can be butterflies and rainbows. Realistically, we have to have conversations that are loaded with stress, bad news, or complex information.

Collaborating effectively with clients means tackling tough conversations. Project partnerships have to start with an early acknowledgement that these will occur and an agreement that they will be processed together. This has to go all the way to the top of the organization. As an executive or leader, it's important to welcome these moments as an integral part of the process, not as a failure of the team.

Prevent misunderstandings

Technology creates tension. (Think about it until you agree.[1]) This is one of the primary differences between interactive projects and any other type of project. But you can alleviate some of this tension if the *reasons* for it are addressed with open communication.

Openly discuss the truths about technology. This will give clients the context and knowledge they need to understand what makes interactive projects different. Here are three points that prep the team for what's ahead:

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1 Mahtab Rezai, Twitter, 2009.

TECHNOLOGY ALWAYS EVOLVES. Many clients are still more comfortable with traditional media. An ad campaign or a rebranding effort has a finite end, but interactive projects are different. They're always changing: existing software is updated, new software is created, and this affects how it all works together. If you can help clients understand and anticipate this it empowers them to think in evolutionary terms. It's no one's fault if a new browser is introduced the day the project launches. It's just how the interactive world works.

THE LAUNCH IS THE BEGINNING, NOT THE END. It's very satisfying to launch a site or an app, and it's certainly well worth celebrating, but not because it's the end of the project or the work. Most interactive projects need to evolve. They'll require updates to content, site architecture, code, or software. It's like a puppy: To keep it alive you have to feed it and walk it, and it sometimes poops on the floor. Making the client aware of this and keeping it in the front of their minds will give them a better sense of the real scope of the project beyond the launch day balloon-drop.

SET REALISTIC EXPECTATIONS. Recognizing and tempering unrealistic expectations will keep everyone happier in the long run. Technology won't solve everyone's problems; it may not eliminate work. Discussing this proactively *before* it's a problem makes it easier to correct if it *becomes* a problem.

Types of communication

Understanding why and when to communicate with the team is critical to doing it effectively.

Transactional vs. relational

The purpose of project communication can be broadly categorized by two intentions: to exchange information (transactional) or to build relationships (relational). Knowing which category your information falls into will determine which mode you use to communicate it (Figure 4.1).

> ***YEAH, BUT…****How can I execute relational communication if I don't have access to the client?*

GLAD YOU ASKED…If you're in an organization where project managers can't connect with the client directly, contact the account manager with the same messages you would send the client. From there, suggest that you both reach out—or just the account manager, if that's more appropriate for your workplace.

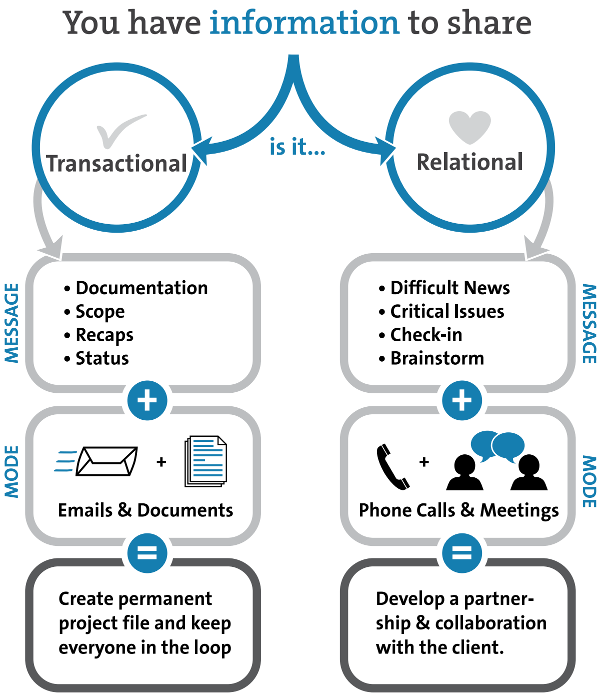

FIGURE 4.1
The differences between transactional and relational communication and common scenarios in which to use each.

Scheduled communication

Scheduled communication could be daily, weekly, biweekly, and in the form of email, meetings, and so on.

The most common example of scheduled communication is the status report. Make a schedule for disseminating the status report and stick to it. Also, establish what the report's content will be and stick to that, too. For example, weekly status emails might be sent on Wednesdays to all stakeholders. The emails could include what was accomplished the previous week, what is currently being worked on, and what is slated for the following week. (Look for guidelines for kick-ass status reports later in this chapter.)

Who gets status emails? Everyone. Yes, everyone. Not just clients and/or decision makers. Everyone should be in the loop and on the same page. Think back to those four attributes we talked about: open, clear, collaborative, and thorough. These group emails will help keep the project working within these lines.

Establishing regular communication will also help organize the stakeholders—both internal and external (Figure 4.2). People can be loosely grouped into three types based on how they participate: discussers, deciders, and communicators. This will also create a sense of calm. Everyone knows when they'll find out the details that they need to know. And it helps avoid the dreaded, "Where is this?" emails from stakeholders.

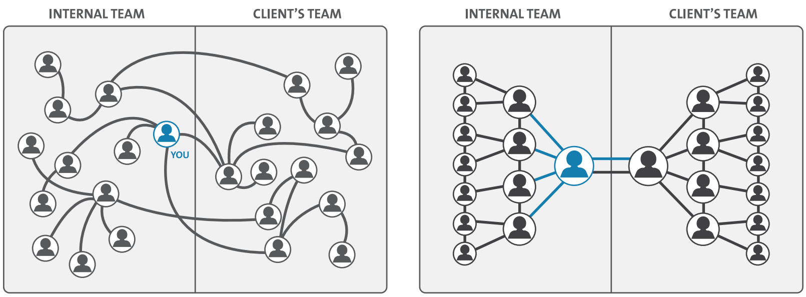

FIGURE 4.2
As the client and your team determines the discussers, deciders, and communicators on each team, the chain of communication starts to look more organized and efficient.

Ad hoc communication

CHECK IN

If a client or colleague expects an immediate response, you can always reply with, "I'm working on this. I'll let you know by the end of the day." This let's them know you are acting on their request, without pressuring you to come up with a definitive reply in minutes.

This is the most frequent and least defined form of communication. It's all the stuff that happens apart from the scheduled emails and documents. It's the random emails, impromptu phone calls, handwritten notes, or feedback. Let's face it: This is the most typical kind of correspondence that happens during a project. And it can also be the most difficult to wrangle.

Most clients won't be as organized as you want them to be with their communication. Most of your designers and developers won't be, either. They'll pepper you with rapid-fire emails with ideas, changes, or questions. Sometimes, they'll shoot you *many* of these a day. Or their feedback will be something really clear, like, "Can you change this? It doesn't seem right."

How to handle this

Being aware of what you may be communicating nonverbally is as important as creating a good paper trail. Poise and calm will have a huge impact on the morale and outlook of the team.

TAKE YOUR TIME. Don't let questions coming at you with lightning speed throw you off. Responding within 10 minutes of every email doesn't mean you're better. The quality of the response is far more important than the speed of the response.

Clients look to interactive teams for insight and knowledge. Give them that. Not surprisingly, sometimes insight and knowledge take longer than 10 minutes. Nearly every question leads to a few more due to the interconnectivity of interactive projects. Proactively analyzing what potential follow-up questions may be or what aspects of the project the original question affects takes time.

BE CALM. As you find out information or details that make you feel like your project is going off-course, stay levelheaded, at least in front of your team. Even if you never say, "How the hell are we going to get this done?!" the team will see it on your face if you're not careful.

RIGHT TIME AND PLACE

If you want or need to freak out—we all do sometimes—do it out of sight of your project team and in the company of someone who can help you brainstorm solutions or just be a sounding board.

MEET THE TEAM: Reacting to different types of people

Here are the remaining archetypal characters that you'll find on your team. (Others appear in Chapter 2, "Interactive Project Management 101" and Chapter 3, "Emotional Intelligence.") They're strong personality types that, ultimately, need to work collaboratively within the team to keep things moving along. Reacting to them intelligently makes all the difference.

THE BLOWHARD. She gets riled up. She makes exclamations. She blows off steam—not really complaints, just big, blustery energy. But like the complainer, she puts her head down and works when it comes down to it. The danger is that this high-energy spouting off might make others feel uncomfortable or taken aback or even attacked.

This person will probably always need to vent, but encouraging her to do it in a private, controlled environment is a good idea.

THE GEM. This person is exactly what you think: a fantastic colleague, great at her job, totally reliable. Thank your lucky stars if you get one or more than one of these on your team. Cherish her.

Hope for one of these on every team. Just be careful that she doesn't slide into Hero territory.

Best practices

Communication is broad and can mean many things. Following a few guidelines will make it manageable and effective.

Hit send with success

Effective formatting can mean the difference between clarity and confusion, but people don't do it, as evidenced by our inboxes. People hate emails so much that some companies are trying to ban it. Email isn't the problem, sending bad emails is. **The bottom line: Don't make people work hard for information.**

BREAK UP LONG EMAILS. When you're writing a long email, break it up into sections. Start with a summary that concisely outlines the main idea(s) and any action items within the email. Follow this with the details. This way the reader can grasp the key info quickly, and then read the details only if she has to.

TYPOS MATTER

Every time you send an email, you have the opportunity to help or hurt your credibility. Typos aren't about the grammar police. They matter because they affect peoples' trust in you: if people can't trust you with small things, it's harder to trust you with big things.

PUT COMPLICATED EMAILS IN A PHONE CALL SANDWICH. With interactive projects, sometimes you have to convey complex or technical information. Here's what to do:

- Write the email (check the long email tip above!), but don't send it.
- Call the client and give her a heads up that a long or complicated email is coming her way. Don't make it sound ominous: The point is to prevent fear and glazed-over eyes. Say something like, "I'm about to send you a really detailed email. It has a lot of information in it that I've tried to organize into digestible parts, but here's the basic summary. I will call you in a bit to see if you have any questions about it."
- Send the email.
- Later, call the client for follow-up. Make sure she understands everything in the email and is prepared to deal with whatever might be required.

DON'T THROW GRENADES. Never send an email that states a problem with no solution. Be complete: state the issue. Then, make suggestions about how to correct the issue. List some next steps that the client needs to or should take, or invite her suggestions on how to solve the problem.

FORMATTING IS YOUR FRIEND. Use things like subheads, bullet points, and bold text to make the information as easy to read as possible. (Side note: This is one of those things that clients love and developers hate. Some of them may even have their email set up to strip out certain types of formatting.)

CALL OUT NAMES. Get people's attention if you need it. When information is directed at a particular person, add her name or a special callout in front of the pertinent info or question. Highlight or bold names so team members can easily scan long emails for their callouts. Whatever tool you use is up to you, but make it easy for everyone to spot with just a scan.

WRITE THE SUMMARY LAST

Sometimes you won't know how to summarize what you're writing until you've finished it. When writing a long email, get all your thoughts out first. Then, go back. Reorganize, edit, reformat, and, as a final step, write the executive summary.

Keep everyone in the loop all the time

At Clockwork, we use two email aliases—internal and external—that team members use to communicate with the project teams. The internal alias goes to all internal team members; the external one goes to everyone on the internal team as well as all client stakeholders. Almost all correspondence goes through the group alias. This terrifies some people, and shocks others. This is a radical departure from the way project correspondence happens almost everywhere else, across industries.

What is an email alias?

An email alias as we use it at Clockwork is a singular email address that has multiple recipients. For example, when someone emails internal_bestprojectever@company.com or bestprojectever@company.com, it goes to the entire internal or external teams, respectively, working on the project. Figure 4.3 shows examples of information sent through an alias.

KEEP IT CLEAR

Be sure to label the internal alias with the word "internal" first, or you risk sending internal conversations to the client too easily.

FIGURE 4.3
A selection of the types of information and conversations that should ultimately be routed through the project email alias. The goal is to keep everyone on the project aware of decisions, conversations, and updates.

DIY ALIAS

Making an alias does require some handy IT department work. If this isn't possible, create a contact list in your own email program for internal and all project recipients. That way it's easy and quick for you to email everyone.

Why use an email alias?

IT KEEPS EVERYONE ON THE SAME PAGE. **All stakeholders deserve to see *what's* being said and how it's being said.** This allows the project manager to focus on macro tasks, like hierarchizing and prioritizing information, rather than trafficking information. Everyone can be confident that critical information will be passed along to the right people, but they are still aware of what's going on.

IT REDUCES THE TELEPHONE EFFECT. Remember that game? A phrase is whispered to one person, they whisper it to another person, and so on, all around a circle. Then the last person says the phrase *she* heard out loud. Every single time it will be different from the original phrase. That's super funny on the school playground in third grade, but slightly less funny when it's critical information about a client's project and your job depends on it.

IT GIVES PEOPLE PERMISSION TO IGNORE EMAILS. Another effect of group aliases is counterintuitive to what people expect. A common response to us describing the email alias is: "You must be overwhelmed by emails!" Actually, the opposite is true: It gives everyone permission to read them (or not) at will. This sounds like a bad thing, but it's not. As people receive the emails, they are tangentially aware of the conversations, yet they know that if something is needed it will be called out by the project manager (by using a callout technique like we discussed above).

ASK YOURSELF

Don't know when you—or others—are hoarding? Here's a hypothetical question that may clarify things: If you got hit by a bus, would someone be able to come in and understand the work you did and are doing on a project? If not, you're hoarding.

IT IMPROVES THE END PRODUCT. Interactive projects have many stakeholders that all see different risks, forecast different outcomes, and bring different ideas to the table. **Allowing everyone to see all correspondence leads to more eyes and minds considering all aspects of the project and increases everyone's investment in the project.** That's priceless.

IT REDUCES HOARDING. Somehow, somewhere, people got the idea that if they're the keeper of information, they'll be totally indispensable and will have eternal job security. This just isn't true. No one likes a hoarder. It makes everyone's job harder. If someone has to work at getting information to do their job, they are taking valuable time away from actually *doing* their job.

Figure 4.4 shows how the email alias relates to communicators, deciders, and discussers.

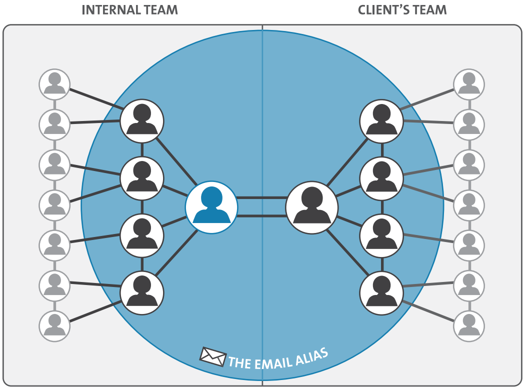

FIGURE 4.4
The primary communicators on each team—internal and client side—send the majority of the email communication through the alias. The deciders receive every message to stay up-to-date, and can certainly contribute as necessary.

Be consistent and clear with scheduled communication

People respond well to predictability, openness, and clarity. When you're communicating use tools that adhere to those standards. Think of this communication as a snapshot. It should give just enough information to be useful and explanatory, and never so much information that key details become lost like a needle in a haystack.

Forms and documents

CREATE TITLES AND HEADLINES. Make the contents and the purpose of the form visible at a glance.

MAKE IT EASY TO SEE WHAT NEEDS TO HAPPEN. Does the form require a signature? Make it clear. Does the form require an answer? Make it clear.

MAKE THEM EASY TO PRINT. Make sure the contents fit easily onto a standard sheet of paper. Make sure it doesn't contain an embedded image that's huge and will clog up the printer queue.

CREATE A CHANGE LOG. This will make it easy for the client, and you, to track the files. At a quick glance, you'll know if you're reading the most up-to-date version and what changes have been made.

DON'T HIT DELETE

If you're deleting something that was initially very important, use the strikethrough formatting tool rather than actually deleting it. This allows the team to still see it and easily note that it's been "removed" from consideration. It's a clearer way to communicate that the project changed course and easier to track later, if you're retracing your steps.

Revision	Date	Notes/Author Initials
.01	1/31/2012	Draft for internal review [MCW]
.02	2/15/2012	Draft for client review [NEL]
.03	3/2/2012	Revised draft for review/approval [ECN]
1.0	3/20/2012	Baseline approval [MCW]

Status reports

USE A CONSISTENT FORMAT. Always have the information in the same order, use the same callout techniques, and make it easy to print.

USE UNDERSTANDABLE LANGUAGE. This isn't the place to use a lot of jargon (is there ever a place for that?). Use language and terms that are familiar to everyone who reads it.

COVER EVERYTHING. Don't leave anything out. The clients should be getting all the information they need in this communication. They should come to rely on it and see it as the official progress report. If you leave the bad or tough news out, it will become apparent.

BE RESPECTFUL. Be firm and clear, but don't be a jerk. If something changed direction, don't let on that it was annoying, even if it was. Collaboration won't happen if anyone on the team starts feeling antagonized or attacked.

Wrangle, then react with ad hoc communication

Project managers control and disseminate everything that needs to be communicated. This means that they also have a lot of information coming *at* them. **Organize your communication for optimal effect: Digestible, thoughtful communication helps people—and their brains—do their jobs well.**

How to handle this

COLLECT AND ORGANIZE THE INFORMATION. Do this in whatever way makes sense for your project or the correspondence: by type—ideas, action items, red flags, decisions—or by affected stakeholders—client, writers, developers, executives. Make the information make sense to you, and then add the details that will make it make sense to others.

DETERMINE HOW TO COMMUNICATE. We're used to email. That's pretty much the go-to form of communication these days. But it should primarily be used for transactional aspects of a project. **At times, it's best to reach out in person, for that relational approach.** This doesn't necessarily mean face-to-face, but it does mean a real conversation in real time.

Here are some situations when it's best to have a conversation:

- If there's a high chance that something will be misconstrued or misinterpreted in writing: "As we mentioned earlier" can sound like "We told you so" with the wrong intonation.
- If it's a difficult message: "About that launch date…"
- If it's a complicated issue that requires explanation.
- If you feel like you should connect with your client. Follow your gut on this one. If it's been a while and you think that reestablishing a real connection—not just an electronic one—sounds right, do it.

DISTRIBUTE THE INFORMATION. Take the organized information and disseminate it. Part of it may go in an email to your team; part of it may go into a document that is then sent for reapproval from the client; part of it may have already been addressed in a phone call. The key is to make it easy to read, understand, and respond to. That's one of the key responsibilities of the project manager: to make sense of things and communicate this "sense" to the client and internal teams.

Follow-up after phone calls and meetings

When you have a phone conversation or meeting, follow up with an email that summarizes what was covered. It doesn't have to be an Official Recap of the Conversation form, just an email that references the discussion and quickly sums up the points. This accomplishes three things:

- It relays the conversation to the whole team (use the alias!).
- It provides a record for everyone (in some circles this is known as CYA—cover your, well, you know).
- It helps ensure that whatever points were talked about were actually *understood*.

Killing three birds with one, simple stone. Sorry, birds.

These are all important accomplishments, but the last point—making sure it was understood—is a critical, client-facing detail. Miscommunication happens. People say one thing, but mean something else; you hear one thing, they meant another. Really, it doesn't matter how it happens; you want to prevent it.

This recap gives all parties a chance to see *in writing* what was heard and what action is being taken. If there's a discrepancy between what was meant and what was understood, that will become clear right away, as opposed to later, *after* action was taken.

Deliver context, not truth bombs

Truth bombs are brutal facts without context. Problems, issues, and dilemmas happen. How you convey them can make all the difference in the world to you and your client, and your relationship.

Look at your communication with this in mind. You can recognize when you are about to send a truth bomb. Remember, something that seems straightforward to you can be very scary to people who don't have enough info or tech knowledge to provide a context or meaning on their own.

THINK ABOUT: Translating a truth bomb

The Problem: A popular Internet browser just released a new version and parts of a client's site won't work with it. (Surprise!)

Truth bomb: An email that says, "Your site is broken." (I'm sure you think we're joking, but we've seen emails like this.)

Context: An in-person conversation starting with, "The browser came out with a new version, which they do every so often, and we're noticing that some elements aren't working like we intended. We'll do some testing on our side and let you know what we find. Then we can determine what you'll need to do to bring your site up to date."

Give a solution-focused no

We all want to give clients what they want. But here's the problem: What they want isn't always what they need. If what they're asking for seems (or definitely is) a bad idea, tell them. Here's where it gets a little tricky.

Even if the answer is no, it's never *just* no because that doesn't help reach a solution. That doesn't mean that we do everything we're asked. Far from it. But we make a lot of effort to avoid stopping at the word *no.*

Being honest about whether something is possible, logical, or neither—all without just saying no—requires finessing.

PUT A POSITIVE SPIN ON THE NEGATIVE MESSAGE. When people hear no, they react a certain way—they close down and get defensive, and may become even more entrenched in their perspective. Ultimately, no matter what you're saying no to or disagreeing with, you need them to collaborate on a solution. **Couching your "no" within positivity and productiveness paves the path toward collaboration.** For example, you might say, "I see what you mean and what you're going for. Another way to achieve that might be __________. Leading questions can get to the root goal or intention, which you can then solve another way.

FIGURE OUT HOW TO SUPPORT THE ARGUMENT. Each client has different concerns and objectives. Some will repsond to an argument about technology restrictions, whereas others may respond to aesthetics. Some won't really respond to either. Given your experience with them, choose a persuasive path.

USE REASON AND LOGIC. Don't ever just state your critique or opinion of their solution without giving real reasons and using sound logic. "Because we think it's best" doesn't count. You have to give them evidence, whether that's usability stats, development restrictions, or something else.

RULE OF THREE

Like in comedy, we apply the rule of three. Voice your solution-focused "no" three times, then drop it. After three times it's pestering. As long as you can—with a clear conscience—launch the project the way the client is asking, let it go. Perhaps later, they'll see your point. Perhaps not. Sometimes that's just how it goes.

Good news and bad news at the same velocity

"Good news and bad news at the same velocity" is one of our key company values.[2] It's a promise that you make with your team to get the best end product every time. When you uphold this, what you're really saying is, "We will always tell you what you need to know about a project."

2 We have to give Gary Clark credit for this valuable principle. It's served us well.

Negative feedback is a lot easier to hear—*really* hear—if the recipient knows it's coming from a shared value. **With a team relationship based on trust and understanding, constructive criticism is welcomed because it means that the project will be improved upon and, ultimately, better.**

Diffuse tension with four words

Every time you talk to anyone about anything—so yes, all the time—you carry the emotions of the message with you. And the person to whom you're talking responds to those emotions. For example, if you're telling someone that you just won a $20 million lotto, maybe you'd jump up and down or smile like a kid in a candy store. And when they hear the news, they'd get wide-eyed and put on a happy face, too.

When you have difficult messages—be it bad news, problems, complications, or what have you—you also carry emotions with you. With a difficult message, you likely bring stress, anxiety, and perhaps anger and frustration. A typical response to these emotions is defensiveness, which is only human.

How do you diffuse this tension? Start the conversation with four words: "I need your help."

Like defensiveness, it's human nature to want to help people when they ask and when you can. **Use our universal human instincts to move the project forward rather than squash it.**

Starting with "I need your help" puts both you and the other person in an entirely different emotional place and shifts the energy of the conversation. Rather than being on the offensive and defensive, it brings you together on the same team. Which is truly where you are anyway. Then you can discuss the issue and how to achieve the goal at hand.

Managing conflicts by looking ahead, not behind

Frequently on a team there comes a moment when it becomes clear that two people have an issue. You may not know what it is, but you can see it. An "aha" moment may go something like this: You're in a meeting and team members are sharing info *in* the meeting that really should have been shared *before* the meeting. That means they aren't communicating. However the issue arises, the important thing is to recognize that there are immediate steps and long-range steps that need to be taken.

Get into the right frame of mind

IT'S ABOUT THE PROJECT, NOT THE INDIVIDUALS. Remind yourself and your team of the common goal and the reason you're all there: the end product. Shifting the focus off individuals and toward the shared goal will also shift energy from inward to outward.

DON'T TAKE THINGS PERSONALLY. Business is about people, but it's not personal. You have to think about people and treat people like people, but refrain from taking anything personally.

LET FEELINGS HAPPEN. People get angry and hurt and frustrated. That's okay. Don't internalize it or feel obligated to make them feel better. You have a responsibility to achieve the best end results for the project. Be supportive, but let people feel what they're going to feel, while also making sure the project's moving forward.

STAY NEUTRAL. Whether you're the project manager or a leader, you have to remain neutral and steer clear of any drama. See below for how to fix the drama.

Take action

DON'T CALL ANYONE OUT IN FRONT OF THE GROUP. Don't try and get to the bottom of things in front of the team. This won't help solve the immediate problem.

IN REAL TIME, SUGGEST A SOLUTION. For example, let's say a designer didn't supply a front-end developer with all the rollover graphics for a page. And the designer doesn't like the solution that the developer came up with. Just decide, with the team, what to do: change graphics or keep graphics. Then assign follow-up tasks accordingly.

AFTER THE MEETING, DETERMINE WHAT HAPPENED. Don't bring any assumptions into these conversations or fill in blanks about why things happened as they did. Don't express blame or shame, because pointing fingers won't make anyone feel good, nor will it help the situation. Even if someone dropped the ball, making her feel bad about it won't improve her work, your relationship, or the end product. Once you have the facts, see what you can do to minimize the chance the problem will happen again.

ONE-PERSON CONFLICTS

What happens when the conflict involves only one person? Perhaps someone's creating a bottleneck because they're taking on too much or not delegating enough. Rather than saying, "Why are your projects and tasks getting backed up?" say to her, "Help me help you."

FIND THE ROOT OF THE PROBLEM. The question you ask should *not* be "What went wrong?" The real question is "How can I prevent this problem from happening again?" If you stop your problem solving at "what went wrong," you're missing the point and not truly helping your team work together. You want to figure out the root of the problem—Is the process ineffective? Was there a communication breakdown? Do these two people just not work well together?—*to* ensure it doesn't recur.

MAKE SURE EVERYONE HAS WHAT THEY NEED TO KEEP WORKING. While you address the bigger causes, ask your team, point blank, "Do you have what you need to keep the project moving forward? What else can I do for you?" This might be additional files or a new brief, or it might mean making them feel like they're being heard. Either way, don't let the project sit still while you figure out if anything needs to change on the macro level.

Takeaways

Communication is key to making a project successful. Thinking and analyzing mean nothing if the results of that thinking and analyzing aren't communicated. Emotional intelligence is wasted if you don't adjust your communication to the person or situation. Being the eyes and ears of a project won't be productive if you're not also the mouth.

- Effective communication is open, clear, collaborative, and thorough. Measure your communication against these qualities.
- Being consistent in how and when you communicate will set a calm and responsible tone for your team.
- Take your time when composing and responding to messages and questions; thinking before acting always pays off.

Ultimately, always think about the recipient when you're determining how to communicate; the quality of your communication skills correlates directly with how well she understands.

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