Project Management & Partner Interaction

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Your questions?

Do you have burning questions about project management and partner interaction?

Learning objectives

1. Recognize that project management is required for a successful summer and know which tools we'll be using

2. Be aware of main deliverables for the summer

3. Understand how to interact with DSSG partners

4. Set expectations for next week's site visits by the DSSG partners

Project management is like...

Why project management and which tools will we use

>> Project Management is important because:

- We want to make sure we organize ourselves to **achieve our learning objectives**
- The summer is short so we need to do some **planning** to maximize the time we have
- **Partners have expectations** that need to be managed
- You will be working in teams so **coordination and team norms** are required

>>Tools we plan to use:

- **Trello** (we will provide training, tbc)
- **Calendars**
- **Email**
- **Slack**
- **Video-/ Teleconferencing**

Main Deliverables

During the summer you will be producing the following deliverables:

1. Data Stories and Summary Statistics

2. Technical Report

3. Final Report/Draft KDD Paper

4. 20-Minute Technical Presentation

5. 3-Minute-talks

6. Model (including documentation for partners)

7. Poster

8. ...other project specific?

Will be discussed in more detail later

Interacting with DSSG Partners

Who are the Partners?
- It depends… ask them! What is their role? What is their background? What is their interest in DSSG?
- Are they like the rest of their organization or are they leading "the data charge"?

Who interacts with partners?
- Everyone in the team BUT please coordinate with PM
- In the beginning you will have many data questions and will want to interact with data owners, later on with the person for handover, etc.

How do we interact with them?
- In a coordinated way!
- In person during partner visits
- Remotely (phone, email, Slack, …) during most of the summer
  - On a regular basis: weekly meetings / calls
- In a professional way: agenda // action items // someone taking notes // follow up

Interact with them as much as possible

Remember: **Partners** are called *partners* not *customers*, *commanders* or *adversaries*

General Communications: Do's and Dont's

DOs:

- Use your LTASQ "license to ask stupid questions":
  - "I've only been introduced to this yesterday so forgive me if this is a dumb question..."
  - "I'm clearly not a police officer.."
- Ask WHY (~5 times to get to the root cause/root issue)
- Respond in a timely fashion
- "Under promise and over deliver"
- Notify asap when you foresee deadlines might be missed
- Prepare partner meetings
- Be inclusive in communications (CC all)

DONTs:

- Commit deliverables to partner that haven't been agreed with the rest of the team (incl. PM & TM)
- Source from POOMA - be fact based
- Forget to take a partner along in the process (they probably don't know as much about data science as you)
- Forget about external communication guidelines as shared by Rob
- Don't give an answer if you're not sure

What to Expect during Site Visits

During partner visit we hope to achieve the following:

1. Explain to fellow how DSSG is going to help your organisation
2. Introduce partners to the team of fellows and vice versa (+ DSSG partner cohort building)
3. Deepdive into the content of this summer's project (data sources, scope, objectives, etc.)
4. Create a rough plan for the summer (set weekly meeting schedule, etc.)

Who's coming?
- 1-3 people from the partner: 1 project lead (+ others?)

We'll be focusing on understanding:
- ...the problem
- ...what interventions are possible
- ...what an "ideal" solution would be
- ...potential impact & what success looks like

How can you prepare (next week)?
- Read project charters
- Build a list of questions from the charter
- Glance at the data

Preparing other partner meetings

Preparation:

- Agree on meeting objectives
- Share agenda (+material?) with all participants
- Share dial-in number / video conference
- Reserve room

During:

- Review the action items from the last meeting
- Run through list of questions to ask the partners
- Ask someone to take notes
- Recap action items at the end
- Agree on next meeting time

Questions?

Partners

- Can get overwhelmed by many people/many emails (streamlined communications ++)
- May only respond sporadically or partially
- May not hit reply all

Email Etiquette

- Calling out Action Items in one list with who's assigned
- Bolding important notes
- Reply All
- Email Response time