PROJECT MANAGEMENT METHODOLOGY

HOW TO CHOOSE THE PERFECTNPROJECT MANAGMENT METODOLOGY FOR YOUR DIGITAL DEPARTMENT

PROJECT MANAGMENT BASICS

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"Project managers are the most creative pros in the world; we have to figure out everything that could go wrong, before it actually does" - Fredrik Haren

1. INTRODUCTION

Project management has been around forever, it just hasn't been called that. If you think back for as many thousands of year as you like, you will always find great examples: 300-1300 year old castles that still stand today, pyramids (I am not sure if aliens got involved here or not, but still a damn good job), the great wall of China (around 300.000 soldiers and half a million commons were involved in this, took them quite a while to build 5.5k miles of 25 foot tall wall - around a thousand years, but hey, still good), sending people to space - this list can go on forever.

There is a saying that goes, "If a committee needs to come to a consensus, it has to consist of three members, two of which are absent". That's how hard management and coordination is, in a nutshell.

When it comes to choosing a methodology for your creative department, that's where things start getting ugly. It seems like a good idea to stick with the same methodology for a long time, so team members will get used to it, but at the same time, different projects require different approaches. It's like cooking: If you're making an omelet for yourself, it doesn't require much planning, but if you are hosting a dinner party for 10+ guests, you need a defined approach. So, how the hell do you choose the perfect methodology? The answer is, like with every (personal) relationship: It's complicated.

Methodology Types

There are a number of proven project management methodologies out there, each offering some form of value, while sacrificing something else. If you combine them into groups, you will have two methods that are used to manage projects; the rest are just derivatives of those emphasizing different aspects.

Waterfall (Traditional)

Agile (Scrum, Lean, Kanban, Six Sigma)

1. Waterfall

Description

Traditional or waterfall method is probably the most obvious one. It goes in a linear order, when the process is being done one step at a time - one after another. Remember old console games? You have to complete a stage to move on to the next one. (And if you like the game, but the stage proves difficult to complete, you get mad and play even more). This approach focuses on design and planning of the project, before the actual work starts.

Waterfall methodology usually consists of **4 stages**: Brainstorming--> planning/design--> execution & testing-->monitoring.

Brainstorming

You gather your team together and define the requirements of the project. Basically, everyone lists their ideas on what has to be done in order to achieve the end goal.

Planning

This is where the team makes sure that the planning and design will fit the actual end goal requirements. Everyone chooses their tools for the job (for example coding language, content strategy, writing style and what not) and prepares for execution.

Execution and testing

This is where the action starts! The team starts working according to the plan they have, breaking down the project into a few, consecutive phases. After each stage is completed, it gets tested for bugs, fixes, glitches, etc. and the process moves on.

Monitoring

The final stage is the one that pretty much never ends. In order to keep your customers happy with your product/service, you need to be on a constant lookout for ways to improve it, while also provide support for your customers.

Now, these stages don't necessarily have to be implemented for every project that uses the waterfall approach. Some projects may require only three stages, while really small projects can require just one - either way the logic stays the same: the work is divided into phases and one must be complete before starting the other.

Strengths

Waterfall methodology may be the most obvious one, but it doesn't mean it's inefficient. The idea that everything is planned and over planned, taking into account all the possible information available from customers, team members, surveys, reviews, feedback, ideas, latest trends, etc. before anything goes into the market, combined with a crystal clear vision of the end product ensures that the product/service will hit the market in the best possible shape. All the problems are addressed early, during the testing phase, which allows to improve the product as much as possible on the go. Also with everything planned beforehand, you will know exactly how much time and budget is needed to get the project finished.

Weaknesses

The strengths of waterfall method can at the same time be your worst enemy. They are like elderly people - once they get used to a way of doing things, it's hard to kick the habits. If you need to change something in the plan after the plan is written, there are going to be problems. Waterfall method also has the longest delivery time. Clients will not be able to see anything until the final product is ready. If you are doing a large project which has some unclear issues, you might want to reconsider your approach.

Wrapping up

A traditional method is great if you need to know the budget and time that will be required for the project to be done. It's also good if you are doing a project where much change cannot happen in the first place, for example construction: If you are going to be building a two story house, chances are low that you might reconsider and build a skyscraper instead.

However, if budget and time are not a priority and you know or think that frequent changes might be required as you move on, you may want to consider something else.

2. Agile

Description

Agile methodology is an alternative to the step by step approach of waterfall method, which has been used and called this way since 1957. Jim Highsmith, one of the creators of "Agile Manifesto" describes agility in project management as "the ability to both create and respond to change, to benefit in an unstable environment".

Instead of splitting your project into stages that have to be complete in a linear progression, agile method breaks down the project in a few small projects that can be finished and delivered individually and separately from each other. This gives you the freedom of making changes on the go whenever needed, allowing more flexibility, or as the name suggests, more agility in your decisions.

Agile is more like the foundation for different methods, rather than a method by itself. There are a number of derivatives spawned from the Agile idea that are more structured and give marketing teams a better way to lay the foundations for their project management. These derivatives include: Scrum, Lean, Kanban and Six Sigma as the most common ones.

Strength and Weakness

Agile has the same feature that represents both a strength and a weakness for the method. The flexibility of agile allow it to be almost anything you want it to. You can take any project, break it down into small parts and execute, test, polish out each one separately and combine them together into the final product later. The ability of responding to change rather than following a precise plan, while still focusing on the delivery of separate parts, makes agile worth considering.

However, at the same time, that much flexibility might put you off the right track. If you are not careful, countless changes and adaptations can take your project too far from the original idea, which might not be something you or your clients wanted to get as a final result. Constant communication within the team and keeping your priorities in tact are good additions to make to agile, in order to stay focused towards your goals.

3. Scrum

Probably the most structured of all agile derivatives, Scrum was first introduced in 1986, by Hirotaka Takeuchi and Ikujiro Nonaka (of course, every good thing has to come from Japan). Scrum combines aspects from Traditional and Agile methods, making project management focused on end goals, while ensuring flexibility at the same time.

Like Agile, Scrum breaks the project down into a few independent (autonomous) stages and designates each a “sprint” period, consisting of two to four weeks, to deliver that stage of the project. Each two to four week sprint consists of “daily sprints” that focus on delivering some portions of the project for that given day. After this, to make sure the project is going in the right direction and meets all the goals that might have changed in the process, Scrum requires an assessment at the end of each sprint. Also, Scrum splits responsibilities into three roles: The product owner, who is responsible for the end goals and

customer satisfaction, the scrum master, who is the bridge that connects the project manager to the third party and the team (which is the third party), that divides the work and ensures a timely delivery.

Pretty sick if you ask me. This way you are flexible enough to adapt to changes that might come out of nowhere as you go forward, but still stable and focused not to get lost in the process.

Scrum structure consists of stages or meetings: Backlog refinement, Sprint planning, Daily scrum, Sprint review and Sprint retrospective. Here is a quick overview of those steps:

Backlog refinement - Typically this is the planning phase, which happens on the first day of each sprint. You review the tasks with your team and decide what to do with previous sprints. The project manager set priorities for the tasks, which is a key factor in the success of each sprint.

Sprint Planning - Once the priorities are set, the team discusses what they will be doing and why. Exchanging ideas, stories, customer centric opinions and all that happens during this stage.

Daily scrum - This meetings are very short, 5-15 minutes and are designed to keep the job going. Team members exchange information about what they are working on, so everybody is on the same page.

Sprint review - When a sprint is nearing its end, team members present their work for review to make sure that everything is being done correctly and aligns with the business goals.

Sprint retrospective - Happens directly after the sprint review and is all about comments and suggestions. The team reviews what's working well and continues implementing it, while stopping what's not. This way, the next sprint is much more productive and efficient than the previous one.

Strengths

The combination of agility and focus of the Scrum method is great if you need to make tweaks to your strategy on the move, while also remembering about the end goal. Dr. Jeff Sutherland, co-creator of Scrum, reveals how Spotify, a digital music service, was able to outrun Google, Apple, Amazon, Pandora and others. It’s suicidal if you try to compete with Google Play, iTunes and Amazon, however it's possible to beat them in a certain niche if you nail Scrum.

Constant change, adaptation, staying one step ahead, all of this small things adding up allowed Spotify (which is by the way currently worth about $8 billion) to surpass giants of the industry. Probably the best thing that Scrum offers, is the ability to "fail before it's too late" and make all the necessary changes accordingly, constantly striving for perfection.

Weaknesses

Weaknesses of Scum are surely connected with its strengths. While it's possible to tackle considerable goals with the help of this method (be sure to check out how Intel used Scrum to manage a particularly messy project resulting in great success) there are also risks and drawbacks.

Some people cannot live too long with the idea that the design or code they worked on so hard for almost a month is rendered useless during a meeting in a matter of seconds and has to be redone from scratch, possibly adding features that the creator doesn't particularly like. Also the workloads and meetings can sometimes be an overkill for some teams: Too many small details to understand, keep in mind and follow can be stressful enough. In addition, all this can turn the project into a sprint completion rather than working together towards the finish line.

Wrapping up

Scrum is ideal for cases when your company is in deep trouble and action is needed right there and then. It can be a huge boost if implemented correctly and maybe even put you further ahead of competition.
Scrum is also a good method to implement, if you are facing a project that has no specific ending (like publishing articles in a blog consistently). The flexibility allows to adapt and makes changes, while the stability and focus ensures that you stay relevant to your goals and keeps you from falling into the darkness of automated work.

4. Lean

Agile methodology suggests to break your project into smaller parts, while Scrum upgrades the idea with constant meetings in order to better manage the process. However, none of those activities promise high quality delivery.

What Lean method offers, are workflows that will ensure all the separate delivered parts are of the same, high quality. You still break your project into small, separate, autonomous parts, then you assign each part a workflow, which has clear instructions on how something should be done. The amount of instructions and their context is really up to you. For example, you might have planning, design, execution and delivery instructions or maybe just planning and execution for smaller projects.

With Lean, you will be able to make sure that your parts will be of high quality. Lean might not have the strict deadlines and constant meetings, but it will help you build a custom work system for your team. In addition, you can also have different tasks, in different phases of the workflow simultaneously. Just like Agile, Lean is more of a project management concept rather than a full method on its own, but it can be a good starting point for your agency to tailor the processes to fit your needs.

Strengths and Weaknesses

Lean offers pretty much the same thing as Agile, while also ensuring high quality of every delivered part of the project. If you are facing a project which prioritizes quality above everything else, like budget and delivery time, you should consider lean.

On the downside, lean treats every part of the project the same. This means that if you have a part (or parts) that do not need much oversight, you might find yourself in a tight spot. Also, keep in mind that lean does not work towards the end goals much or takes time too seriously, meaning that your project parts can go on and on, and never end. You will have to establish clear communication to solve this issue. It is doable of course, but still needs to be considered.

5. KANBAN

If you like the idea of Lean, but still considering how to make it more structured, Kanban will be a pleasant surprise for you. Created in 1953 by Taiichi Ohno (Japan guys, Japan), Kanban method works like a factory model. In the initial phase the product starts from something small (like vague ideas and customer insights), then gets developed more and more through different stages until it gets to its final version. It's like building a tank: You start with the core body, then expand until you have the final thing ready.

What's beautiful about Kanban is that it allows you to "make as much stuff as needed at a certain amount of time" and stop other processes until they will be needed. So, unlike the waterfall method where you have to deliver the whole product at once, you can leave tasks incomplete at different stages and complete them later, when they will be needed in your workflows.

Basically, Kanban allows to visualize the Agile method and add a bit more structure to it. You can have any number of workflow stages and add as many tasks to each as you like. To help you stay on track and not delve too far from the work at hand, Kanban includes four fundamental pillars that you should follow in order to make the most out of this method.

Cards - If you are familiar with Trello, you will grasp the idea instantly. Trello consists of boards, which consist of lists, which

consist of cards. Cards are there to give all the relevant information, data and resources to make sure the list items get delivered. It's the same with Kanban: each task has cards that includes all the necessary data needed to deliver the task.

Card Limit - there has to be a certain limit to cards that are being worked on simultaneously. This way you ensure that your team doesn't get overtasked with work.

Consistency - Prioritize your tasks in order of completion that you like and ensure that there is always some work getting done here and there.

Kaizen - kaizen is a part of the methodology developed by the author that literally translates into "change is good". I think you already know what this means - constant monitoring and improvement is an absolute must, if you want to be "numero uno". -)

Strengths

Kanban is much like Scrum, in terms of organization and getting the work done, but does not involve as much management and overseeing. It's really good for teams that have autonomous, great members that understand the job really well themselves and can split all the work accordingly without much involvement from the management.

With the freedom of dedicating as much time as needed (unlike the two to four weeks sprints of Scrum) to a task, and also managing the workloads of your team members wisely, Kanban ensures that projects (or parts of it) get delivered in a reasonable amount of time, while minimizing costs. You can always stop something at a given phase and shift your focus to the more important tasks at hand - flexibility with no stress, the dream is real guys!

Weaknesses

The drawbacks of the method aren't that many. One thing, Kanban doesn't have the structure for specific time windows. If you really have to meet strict deadlines, better stick with traditional method or Scrum. It's also problematic for teams that have a single (or few) skills per team member. Even if there is just on such person, he or she won't be able to shift effectively from task to task and will hold up everybody's job.

Wrapping Up

Kanban is a great method if you have a team with overlapping skills and good understanding of their workflows. Flexibility allows to make as many shifts as you like, as often as you like, while still ensuring timely (more or less) and quality delivery.

6. Six Sigma

In 1986, Motorola's engineer Bill Smith (wooow look at that, a non-Japanese person!) invented the Six sigma project management method. But, if you look at it closely, there isn't much innovation involved in Six Sigma. It's more of a combination of Lean, Kanban and Scrum, adding some of the best features of each and discarding the others. (Which practically makes Japan number one again. God I love those guys).

The top priority of Six Sigma method is to deliver high quality product to the client, while continuously improve on the go based on heavy data analysis. You basically "tighten the rope" around Kanban's freedom for time and number of tasks, making them more specific. Due to more precision, resource allocation and cost savings become much easier to calculate and implement, since you have a reasonable estimate for each task. Then you take the high quality part of Lean and add it up here and finally apply Kaizen - continuous improvement along the way. Sounds a bit complicated, but not really.

To help make this thing work, Six Sigma has five essential steps that must be followed for each project part. Just in case you are wondering "why the hell it's called SIX Sigma, but has FIVE steps" I can tell you. The term "Six Sigma" was born from manufacturing terminology, the part associated with statistical analysis. A Six Sigma is a process where the chance to produce a defect free feature or a part of something is 99.99966%. So basically, it's perfection in management terms. Makes a lot more sense now right?

Back to the five steps of Six Sigma. They are commonly known as "DMEDI" which is:

Define - This is pretty simple, similar to all others. Define the scope of the project, determine end goals, exchange relevant info together, etc.

Measure - Since Six Sigma is highly focused on data analysis, the measurement stage defines the way how you will calculate your goals and success. Deciphering consumer value and business value in numerics, is the heart of the method.

Explore - In this step, the project manager tries to figure out how the end goals are going to be achieved. This helps minimize costs and time frames, while boosting effectiveness. Taking past experience into account is very useful here: If something failed during another project, there is a good chance that it will fail here as well. Better think of something else.

Develop - This is the strategy step. Quite a lot of time and effort is dedicated to the planning and strategy, since every little detail

that can be of help to the project gets included here.

Control - The last step is meant for the kaizen or constant improvement. Everything that needs to be learned and implemented in the future is gathered in a single doc and sent out to everyone for future success.

Strengths

Six Sigma offers planning, execution and flexibility in reasonable time frames, while ensuring high quality delivery. The control step is an essential component, allowing you to focus on data and not mere assumptions and intuition. At first it might go slow and take a lot of time and resources, but with enough expertise, data and knowledge documented, you will be able to improve your future processes greatly and that's when you start reaping the real benefits of time and cost saving.

Weaknesses

While continuous improvement is a good thing, ENDLESS continuous improvement can be stressful. Sometimes people need to get satisfaction from a job perfectly done and the idea of Six Sigma that nothing is going to be perfect EVER (there is always room for improvement) can a bit too much. Also there are some projects that are going to be done once, rendering all the data gathering and improvements useless.

7. PRINCE2

Perhaps the most strict method of all that are listed, Projects in controlled environment version 2, or PRINCE was developed by the British government in 1989. With this method, you break down your project into a few parts, but instead of multiple small sprints, each part is seen as a one big sprint, focused on quality and delivery. Depending on what you want to get as an end result, everything else will be tailored accordingly, like shape, workflows and scope.

There are essentially three questions involved in PRINCE2

What's in it for the business (is the money worth it?)

What's in it for the Customer (will clients value this?)

What's in it for the Supplier (do we have everything we need for the job?)

Each team member gets specific instructions on what his work is going to be, which carries onward through each of the seven stages of PRINCE2 methodology:

Start stage - The leadership chooses a project manager and clearly identifies what the final product should be. The project manager then reports to the project board and the board chooses the project direction. The board is also held accountable for the project success.

Initiation stage - In the initiation stage the project manager creates a guideline how the project should be done and reports back to the project board. After the board accepts the approach, the project is divided into phases, all of which can have a separate completion time based on demands. Like in the Traditional method, each phase has to be completed before moving on to the next one.

Direction stage - In the direction stage the exact management processes are defined as what has to be done in any situation and how should the progress of the team be evaluated.

Control stage - Some changes along the way have to be taken into account which is why PRINCE2 has a review step for each stage. When one of the stages is completed, it goes into review and the next stage is planned based on the previous one. If something needs to be changed in any way it is documented and presented to the project board for approval.

Boundary management stage - This is the overall oversight stage. The board closely watches over what is delivered, how is it working out and whether everything is going according to plan.

Delivery stage - As a project manager, the most important part of your job begins here. As the delivery is coming up, you have to make sure everything is aligned with the end goals and prepare reports after each stage for the project board to get approved to move to the next stage.

Closing stage - Closing stage is a detailed analysis of what was done all in all. Everything is documented and again presented for approval to the project board.

At first glance, this approach might seem fit only if you are planning an invasion on mars or if the country is at stake and every small issue has to be eliminated. But, you are free to tailor the number of stages and their descriptions to your needs - just make sure to have the structure, oversight and reportings to the board in place. It's much like the traditional method, with some agility and Lean additions made to it.

Strengths

As you already understood, PRINCE2 is great for projects that absolutely won't tolerate any flaws and needs constant oversight from leaders. That's why it's used by the British government. If you can guarantee that NOTHING will go wrong, this can work well for you.

Weaknesses

Though the seemingly perfect method is well equipped with all the tools needed for success, it still has its drawbacks. PRINCE2 treats all team members like robots and everybody has to have the ability to work in such an environment. This is really hard for creative people, especially in the marketing sphere. While you can reach the highest possible results with this method, you might also fail horribly because your staff might just go crazy from all the oversight and processes.

Summary and conclusion and advice what to choose

As you probably understood, there is no right or wrong answer here. When it comes to choosing the perfect methodology for your digital department, you will have to think about all the strengths and weaknesses of different approaches, understand what is it that you want to get and choose the method, or maybe a mix of methods, accordingly.
The only reasonable advice for marketers can be to choose a methodology (or create a custom one for that matter) that has agility. Marketing is a very dynamic sphere and change is a big part of it, always.

That being said, there might be projects that would work well with Traditional method as well, for example if it's something time proven that you have done for years and you know exactly what step comes after the previous one.

The best thing that you could do, most probably is to develop your own method. Every person is different so that makes all teams different and as a project manager, you should now your team best. Experiment with different methods, but don't go too far with it; make sure you achieve your goals, provide quality and value to your clients.

After all, if everything was so simple and could be written down like "for this-do that" anyone could be a project manager. But life is never that simple right? You, of all people, should be well aware of it -)
If you are using any of the above methods or have developed your own method, we would love to hear about your experience or feedback! Share your thoughts, ideas and comments below.

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