

Project Management Guidelines for Invo

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Conduct (wip)

- Respond to client communication within 2 business hours.
- Code of Ethics:
 - Speak the Truth: We tell the truth to others, with the intention and in the way of trying to do the most possible good.
 - Make the World Useful, Beautiful and Delightful: We exercise the discipline required to produce ideas and things that are useful to and beautiful in the world.
 - Learn, Share & Build: We are curious, open creators who welcome new ideas and the input of others.
 - Be Vigilant: Identify and respond to inequality, protecting and serving the ideas, community and people in our world.
 - Go Like Hell: We are driven and committed to what we do, putting in extra effort in our quest for exceptional results.

Pre-Kickoff (wip)

- ❑ 1-2 weeks before kickoff, send client and stakeholders the kickoff survey.
(https://docs.google.com/forms/d/1Ii4KitXws0w85CLn_LQvLhOHL9p75dMMT2CCc0_iwwM/edit)
- ❑ Create email list for the invo team working on the project: (get someone to edit) `%client-name%-internal@goinvo.com` (ex. walgreens-internal@goinvo.com)
- ❑ Start a new basecamp project. Name it `client-name: product-name` (ex. DataXu: Forecasting). (get someone to edit
- ❑ Setup dropbox for internal team and client (if necessary). Clients get their own directory within `Invo_Projects`. Example; `Invo_Projects/CodeRyte`. If clients have multiple projects, then create a directory for that project within the client. Example; `Invo_Projects/DataXu/Create_Campaign`. All projects should use this directory structure found in dropbox at Invo_Projects/Invo_Project_Directory_Template.
- ❑ Setup channel for the project within Slack. Name `proj-client-name`. Example `proj-dataxu`.
- ❑ Project lead notifies Invo person responsible for billing the first invoice that it can be sent to the client.
- ❑ Setup kickoff date(s) and times 10 days before project start.
- ❑ Review SOW (internal handoff with sales)
- ❑ Start new github repo (if applicable)

Kickoff (wip)

- ❑ Invite all stakeholders to Basecamp project. Add invo'ites to "Our Team" and client team to "The Client".
- ❑ Create project schedule, including regular meetings and weekly deliverables. Share with all stakeholders on Basecamp.
- ❑ Create project spec 1-pager document. **Example to be created.**
- ❑ **Send message to client about using basecamp and email list for all comm. Stub out an example email.**

Weekly Meetings (wip)

- ❑ Face to face preferred. If remote, use GoToMeeting, Skype, Hangout, Phone, ++.
- ❑ Duration: 1 to 1.5 hours. Adjust as needed.
- ❑ Post deliverables on Basecamp 60m prior to meeting.
- ❑ Tactics, best practices
- ❑ Message structure on Basecamp for deliverables:
 - ❑ Subject: Deliverable name, version number, and current project week and total (ex. Create Campaign v04 :: Week 5 of 10)
 - ❑ Message: Discuss what's new in the deliverables, what you'd like to discuss in the meeting, and your next steps as you currently know them.
- ❑ Meeting structure:
 - ❑ ~5m: What you'll be reviewing and what you'd like to get out of the meeting.
 - ❑ ~50m: Review designs.
 - ❑ ~5m: Summarize what you'll be working on next week.
- ❑ Within 24 hours of the meeting, type up your notes and post to Basecamp.
 - ❑ Subject: Meeting Notes, date, and current project week and total (ex. Meeting Notes, 27.Oct.14 :: Week 8/10)
 - ❑ Message: Document the feedback, any changes in direction or schedule, and re-iterate what you'll be working on for next week.
- ❑ Project and Invo review with client each quarter of weeks completed.
 - ❑ High-level of the project status; how we're doing against the schedule and adjust as needed so we can realistically deliver on time.
 - ❑ Ask stakeholders to critique how Invo is doing. 3 times. TBD: Also send survey.

Common Deliverables (wip)

Final Meeting (wip)

- ☐ Checklist
- ☐ Final satisfaction survey (project closed) - see final-satisfaction-survey.pdf
(where???)
- ☐ Permission to use work publicly.
- ☐ Final project poster (ex. 3M (tbd), Microsoft)

Ending a Project

Lead:

In 1 Business Day of Project Completion

- ❑ Send final invoice for the project to the client's billing department. Notify Invo'ite responsible for billing.

In 2 Business Days of Project Completion

- ❑ Project lead sends Client their exit survey.

<http://goo.gl/forms/jge3n36Lh1>

Here is an email template to send to the client.

<clientName>,

We'd like to get everyone's honest feedback on how Invo did for the project.
Can everyone fill out this 5 minute survey?

<http://goo.gl/forms/jge3n36Lh1>

Thanks,

<yourName>

In 3 Business Days of Project Completion

- ❑ Project lead completes marketing material survey.

<http://goo.gl/forms/SfoP7uYVzR>

In 5 Business Days of Project Completion

- ❑ Project lead reviews all Exit Survey responses and presents any interesting findings to the project, leadership, and sales team.

Team:

In 1 Business Day of Project Completion

- ❑ Entire team completes Invo exit survey.

<http://goo.gl/forms/N6MZHjiOL3>

- ❑ Entire team pulls together a handful of the best designs, sketches, and photos to be used for marketing materials. Place logically named images in dropbox > Graphics --> Portfolio --> <clientName>.

Github (wip)

Naming convention

Description

URL

Tagging

....

Dropbox (wip)

... directory structure and explanation...