

**Timelines:
When to do what
with an SMP?**



*"The best time to plant a tree is
20 years ago.*

The second best time is now."

Summary



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- Why does project timing affect how you view planning?
- When best to revise a Software Management Plan?
- How to start a Software Management Plan?

The need to address change



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- A lot of things can change over time
 - Stakeholders, research goals, development practices, use of infrastructure
- SMP: evolving document to reflect and inform action
 - Are we doing the right things for the right reasons for the right people? *What needs to change?*
 - Ideally, detailed practices emerge from this

How does "When" change things?



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- At any stage of a project, there is
 - What you're doing already
 - What you have, should, or want to do later
- Three major time points to consider
 - Before or when project starts, in the middle, near the end
 - SMP still an intention of what you will do
 - Perspective will be different

In the beginning...



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- Consider and *involve* your stakeholders early
 - Who, why, what - but also how?
 - SMPs clarify expectations
- Can't do everything
 - Prioritise
 - Start small, build over time

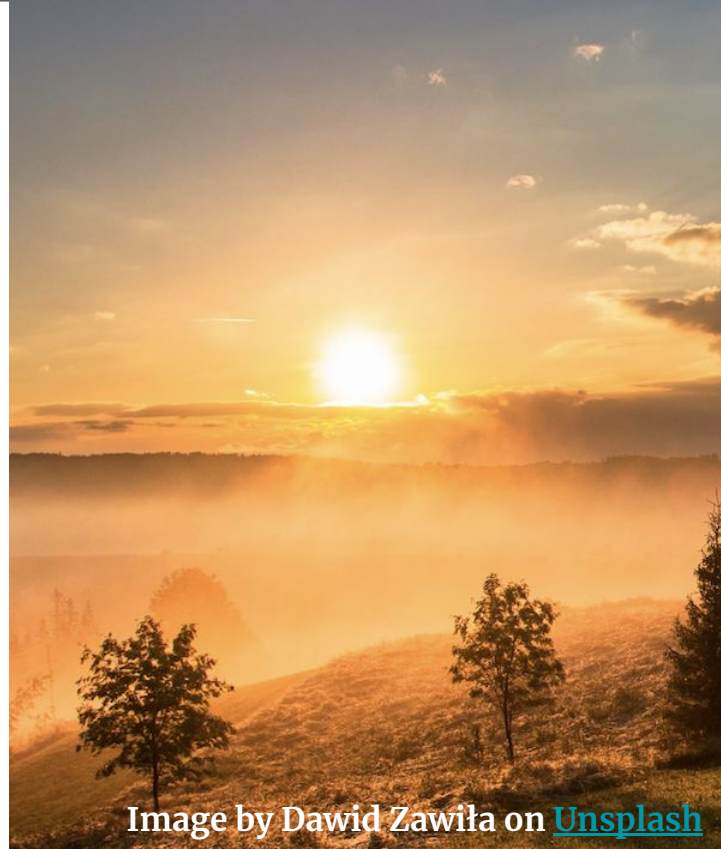


Image by Dawid Zawila on [Unsplash](https://unsplash.com/photos/7KwZwZwZwZw)

On the journey...



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*Can only know where you're going,
if you know where you've been*

- Understand current state
 - What's working/not working?
- What is going to (and should) change?
- Define a (next) desirable state

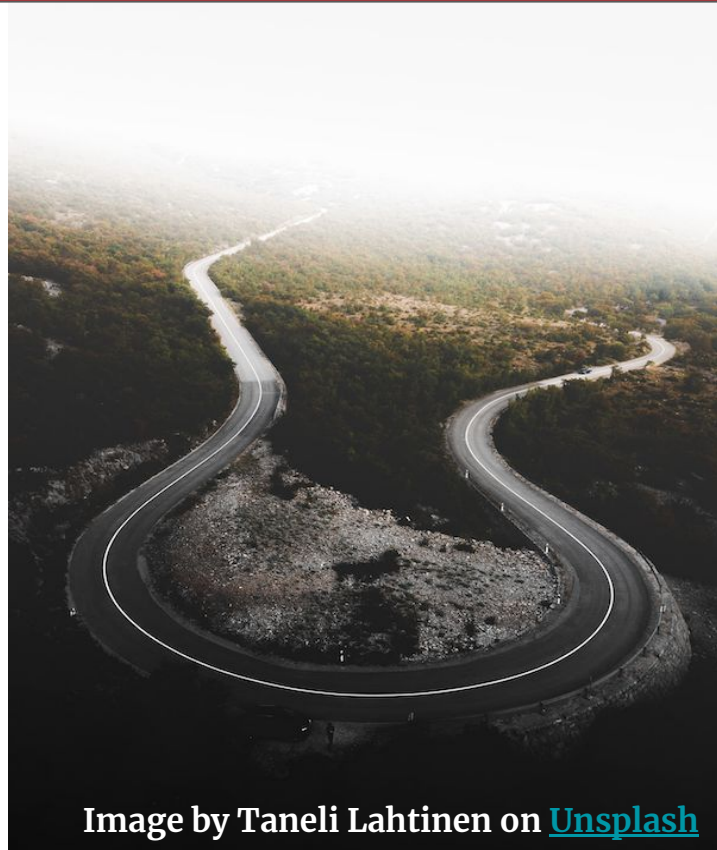


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End of the road...



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- AKA "sunsetting"
- Often seen as negative
 - A "step" in a bigger story
 - Software has intrinsic value
- In project teams
 - *Product* changes, not *project*
- What to persist/preserve, in what form, and how?



Image by Call Me Fred on [Unsplash](#)

How does this fit with managing projects?



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- As PI or project manager?
- *When and how often, where, and to what extent* you do Software Management Planning?

Consider

- Nature of software and development model, e.g.
 - *One-off purpose* - no support, archived or preserved
 - *Traditional waterfall* - long release cycles
 - *Agile* - short, iterative cycles
- Team size - *small vs large*

Example timeline - how focus changes



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1. At the start - minimal

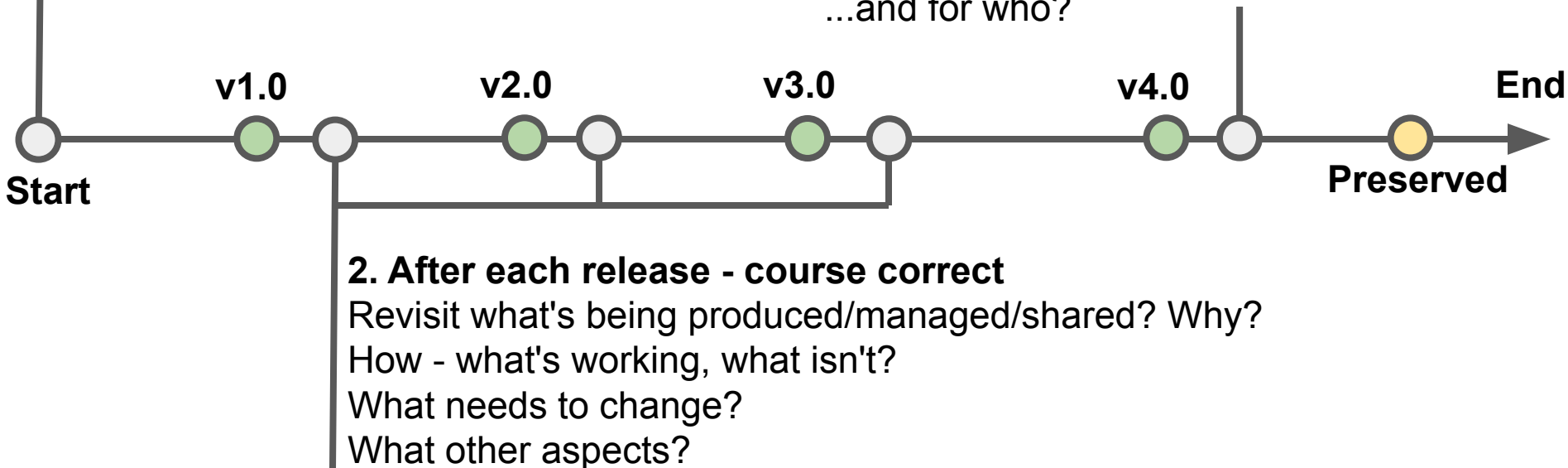
What's being produced/managed/shared?
Who's doing what?

3. Sunsetting

Revisit produced/managed/shared
What should persist/be preserved, and how?
...and for who?

2. After each release - course correct

Revisit what's being produced/managed/shared? Why?
How - what's working, what isn't?
What needs to change?
What other aspects?



Breakout 2: A first SMP - and beyond



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What are you doing now? What should you do next?

Goal: to create...

- Your first minimal draft SMP, based current understanding on what you're doing now
- A rough timeline to introduce desired changes later (e.g. the next release, or other suitable deadline)



Questions...

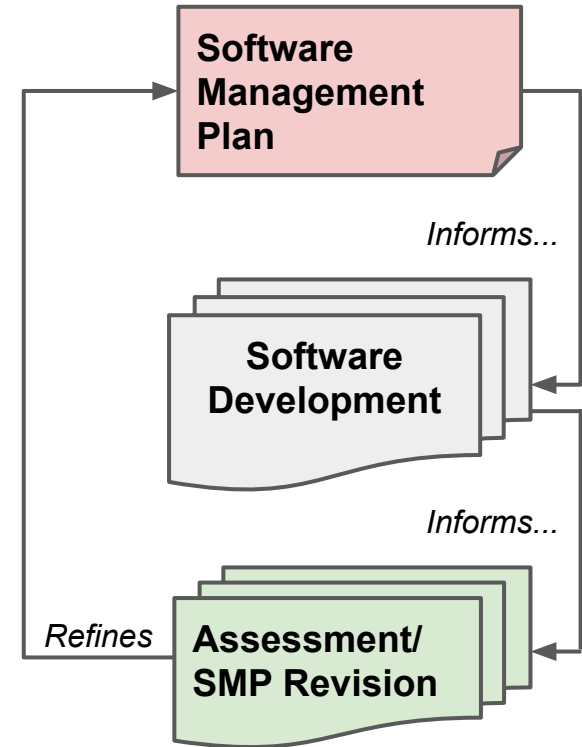
- Who is typically involved in making decisions?
- When is the right point to revise an SMP?
- How do you get hold of the info to put in an SMP?

How to review SMPs?



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- Need to know where you are
 - SMP is what you *intend*
 - Development is what is *actually happening*
- Involve stakeholders appropriately
- Cycle: assess, reconcile, refine
 - Again, prioritise



Software evaluation guidance & online Software Evaluation Service:

<https://www.software.ac.uk/resources/guides-everything/software-evaluation-guide>



- First steps - a draft set of SMP text and a plan to...
 - Put into a separate SMP document and build on
 - Discuss and agree with your team - *the true value*
 - Extend and evolve with your goals and project
- SMPs ideally concise, evolving documents
 - Once defined, set target dates for reviewing and revising
- Use the SSI's SMP checklist and guidance to help you
 - <https://software.ac.uk/software-management-plans>

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