Objectivity

Project Management - Handbook

aka PM Survival Kit

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Project Management Handbook aka PM Survival Kit Objectivity

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What do you hold in your hands?

Actually, it's hard to say.

Let's hope it's something that will make your life easier in the next few weeks until being Objectivity's Project Manager becomes second nature to you. Without much ado, these few pages should help you understand what lies ahead of you and how to deal with it in order not to end up in the same place. Obviously, it's not a compendium of knowledge that will get you certified but if something is missing here, please remember that even though we've grown to be quite a large company, everyone will be willing to help you, just ask.

2

Where am I?

Most probably you already have a desk, a chair, a computer, a mobile and perhaps some other gadgets. It's just about everything you need for work.

A PM doesn't work in a vacuum, so very likely all these people around you belong to your team, be nice to them! Please believe me, if your cooperation goes well, they'll do everything for you and you'll enjoy peace and quiet. It may also happen that there is no team yet but then another PM or a Tribe Master (Program Manager) will be around. They won't do your work for you, you'll have to do your own work, but they can provide massive support. Therefore, it's worthwhile being nice to them too! All in all being nice to other people is generally cool and well seen in Objectivity, so take a risk and be nice to everyone.

Now let's get down to business – in general, when considering your seat, we've tried to plan it and place you near the people that you'll deal with. If it's not the case, two things might have happened:

1. There is an exception to the rule and you already know it.

2. Something terrible happened, so go straight to the PM Guild Master, whom you've already met. If you haven't met them yet, this is either a complete disaster, or you are in the wrong building. If the latter, try to leave as quietly as possible and call for help.

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A few words about our structure – rather boring but useful

Our structure is based on the Guilds and Tribes model.

This is a completely new model, which is designed to support team autonomy in decision-making. In addition, it is supposed to eliminate a multi-level (boring and rigid) structure of managers and directors, which is associated with inertia and long decision-making process. Since project teams are agile, the more the management should follow this path.
In a nutshell, each project\program is a "start-up" and a Tribe Master, together with a team, decides about the direction of its development. Such approach results in an effective and motivated team, working close to the customer and deciding about itself.

A few words about the structure:

Tribe – a team or numerous project teams working for the customer.

Tribe Master – in the old nomenclature (which is just as boring) it is a Program Manager, who is responsible for the delivery and the team. They ensure that the teams have all the tools and processes necessary to implement the projects. As the "start-up" owners, they have the entire project team to linearly report to them (whether directly or indirectly).

Chapter – a group of people within the Tribe with the same skills. This can be for example a group of developers or testers.

Chapter Lead – is a line manager of the people in the group. This person cares about their development and holds One to One[1] meetings. Frequently, they partially perform technical functions in the group, for example they will code. In turn, they will report linearly to the Tribe Master.

Guild – is the same as the Chapter but within the entire company. We have Guilds of developers, testers, architects, analysts and many others. There are also Guilds in Guilds for example Scrum Masters. They are a part of the Project Management Guild but within its framework they have their own Guild. The idea behind the Guild is sharing knowledge and experience between the Tribes in order to avoid the silos.

Guild Master – is the leader of the Guild. The Guild Master has no team and is not a line manager. The main task of this person is to support the development of teams and ensure knowledge-sharing between the Tribes. They ensure consistency of the processes and tools. The Guild Master supports organisation of corporate training, events and actions associated with "thought leadership", for example presentations at conferences. They will also help in the recruitment processes to the Tribes and together with the Tribe Masters or Chapter Leads takes decisions about employment.

Well then, sounds cool? I hope so. In our opinion there is no better environment, which supports ambitious and passionate people. If so far you've been dissatisfied with the situations, where making coffee required five approvals and four meetings, welcome to our world, where coffee maker is at your desk.

[1] One to One is a meeting lasting 30 min – 1h with your leader during which you may moan, cry, complain, request, praise, handle, organise, gossip, motivate and do plenty of other things. On average, it is organised once per a few weeks.

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And now for the soft stuff

You are a part of a Guild which is responsible for the projects. The Tribe Master is your boss and you may always go to them to discuss everything.

Therefore, you'll have One to One meetings with them. You'll plan your development and solve everyday problems with them. Please believe me, Tribe Masters are excellent people, who know the customer you'll work with perfectly. Therefore with time, they'll share a lot of the project knowledge with you and form your first-line support. However, if for some reason any of them hacks you off and you don't feel like talking to them about your problem, the PM Guild Master is always at your disposal.

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Project, program – let's get straight to the point

Project roles

In the majority of projects, you'll have a team to work with. Surely, majority of the project roles isn't anything new to you, one way or another, it's worth mentioning how we perceive these roles in our company.

Developer

In Objectivity, you will meet only good and very good developers. We do not employ any other type! All of them have at least three years of work experience as software developers.

Each of them has their own strengths and favourite technologies. It's crucial that you use these strengths appropriately when you already know your team better. Some of them are senior developers – they'll support you in your communication with the customer and work organisation from the technical point of view. You may confidently entrust them developing the hardest parts of the code, dividing large functionalities into small tasks and solving all types of programming problems.

This time we go sublime – the developers are the salt of the earth and one of the two major elements of the project team (the testers are the other one). Look after the developers, in return they'll deliver your project on time (and with a fair wind, hopefully even within the budget!).

Tester (QE)

A Tester performs one of the essential project roles. All developers say that their code is error-free but we prefer to verify it.

The Testers will be a part of your team from the very beginning of the project pursuant to the assumptions of the agile methodologies. As is suggested by the name, they'll deal with the broadly defined testing. They're responsible for manual, automatic, performance and plenty of other tests. It happens that some of them are highly specialised in one of these areas, if so, you need to remember to use their skills appropriately.

Business Analyst (BA)

The Business Analyst will help you understand who the customer is and what the customer needs are. The Analyst describes how the system we create is supposed to work but not only this.

Mainly, the BA deals with sharing this knowledge with the team. The BA makes sure that the developer knows what to develop and the tester knows what to test. BA makes sure that the team knows what the entire system is supposed to be and does not allow the developers to focus only on their sections. Due to the fact that the Business Analyst works much more closely with the business-side of things, they will be able to provide you with additional information and sometimes hold talks with the customer instead of you. More than once, they'll suggest some solutions to the customer that we, as a company, can offer.
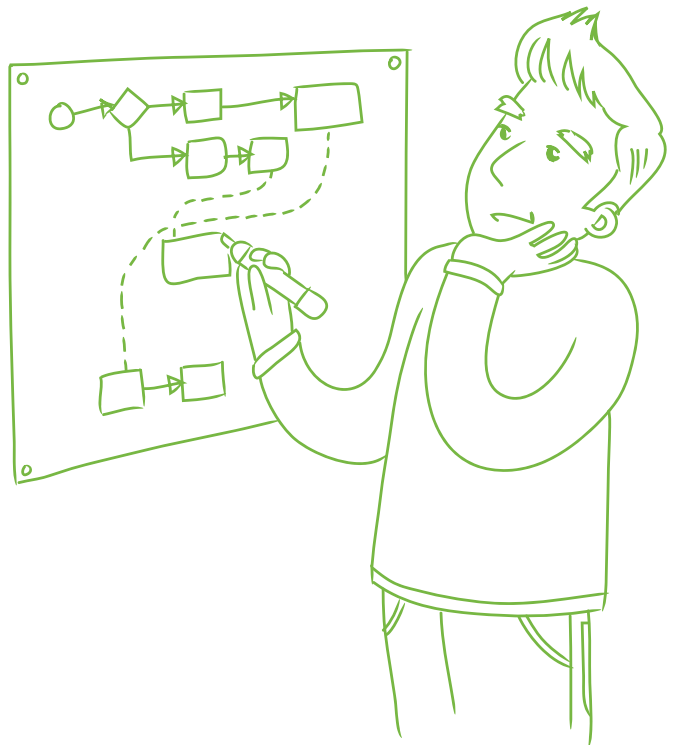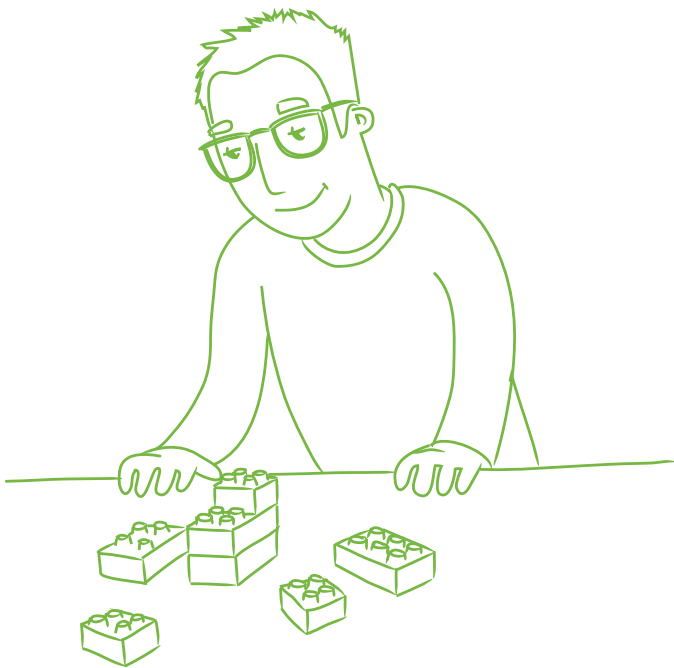
Architect (TA)

The Architect is like an experienced captain, sometimes called the "sea dog". The crew, meaning the developers, will follow them everywhere.

With our architects you may confidently sail through any difficulties in the project. They're the first ones to set off in order to find out the customer needs. Together with the Business Analyst, they'll help you define the functional and non-functional requirements for the created system. They'll create a structure that satisfies customer's expectations and will ensure high quality of code. If necessary, they'll be happy to code something. For, even though their knowledge is extensive, they are not the theoreticians. They have learned the trade and they love it!

UI Developer

The implementation of the graphic interfaces, especially in web systems, is not a piece of cake. Therefore, this task is delegated to specialists.

UI Developer can convert a .jpg into live HTML with CSS. UI Developer takes the trouble to support various browsers. They create the foundations of the site, which are filled in with the functionality by other developers. It's important not to expect the UI Developers to create the graphics from scratch, nor to write the stored procedures in SQL. Yet, to use Photoshop? By all means.

UX Specialist

This is the person who helps to create such GUI that'll be comfortable for the future users to click on and will make them willing to do so.

In order to do it, the UX Specialist should be a part of the project from the very beginning to understand it as a user. The UX Specialist clicks almost as proficiently as the analyst. This person does not only advise the team and the customer on how the user interface should look like but also conducts the tests with end users. The UX tests form a separate task, which requires special planning but they allow to eliminate quite a lot of errors that might discourage the future users. If the customer can't afford to pay 100% for this project role, it's always possible to cooperate with the UX Specialist in the key project moments, such as a demo or backlog grooming. Yet, for many customers this position is rather exotic, so please remember that it's sometimes worth offering it initially as unbillable, to make the customer appreciate the great value, which is added by this role.

Scrum Master

Scrum Master is the person that guards SDPBoLPMM[2]. They make sure that the process takes place in coxmpliance with the assumed criteria and work standards.

Simultaneously, they're interested in getting better with every sprint (the process, not the Scrum Master of course). A Scrum Master does not force through his solutions and project visions – they just help the team members to notice the reasons of possible problems and skilfully mitigate them. They engage the abilities and talents within the team to relevant areas. And help the team in everyday activities.

Remember – you are the one responsible for the project. The SM supplements your role from the side of the process. Therefore, it's vital that at the very beginning (or even earlier) you talk about what each of you is doing in order not to do it twice.
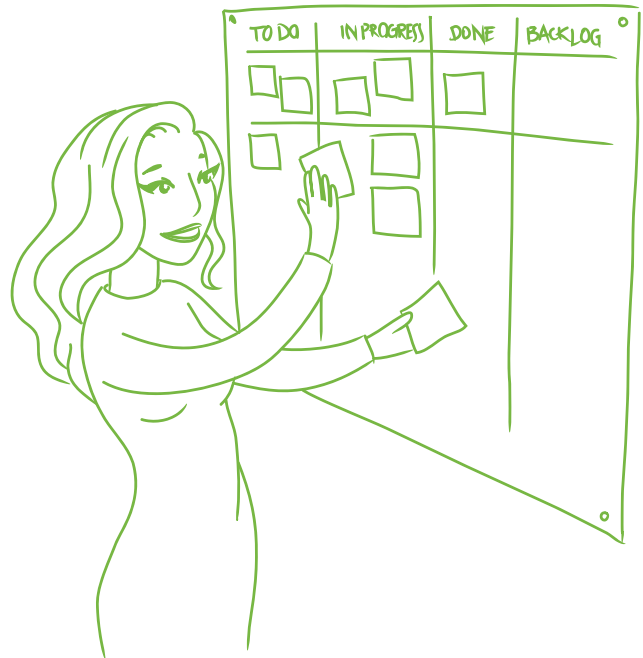
[2] This catchy acronym was created solely for the purposes of this manual and means Software Development Process Based on Lightweight Project-Management Methodologies.

Visual Designer

Visual Designers (aka graphic designers) are real wizards, who move UX-made mock ups into the world of colours, interfaces and all sorts of pixels.

They play an important role in our project teams! In the initial phase of the project, they work with the team in order to make the proposed solution as much functional as possible, also in graphical terms. Then, they create designs of desktop or mobile screens ensuring compliance with the guidelines of client's branding. After acceptance of the graphics, it is the time to work on the style guides of interface's individual elements, on the basis of which the UI Developer encodes the subsequent application blocks. You can also meet the graphic designer in production, where he most probably adds subsequent screens or ensures the consistency of what came out from developer hands with the initial designs.
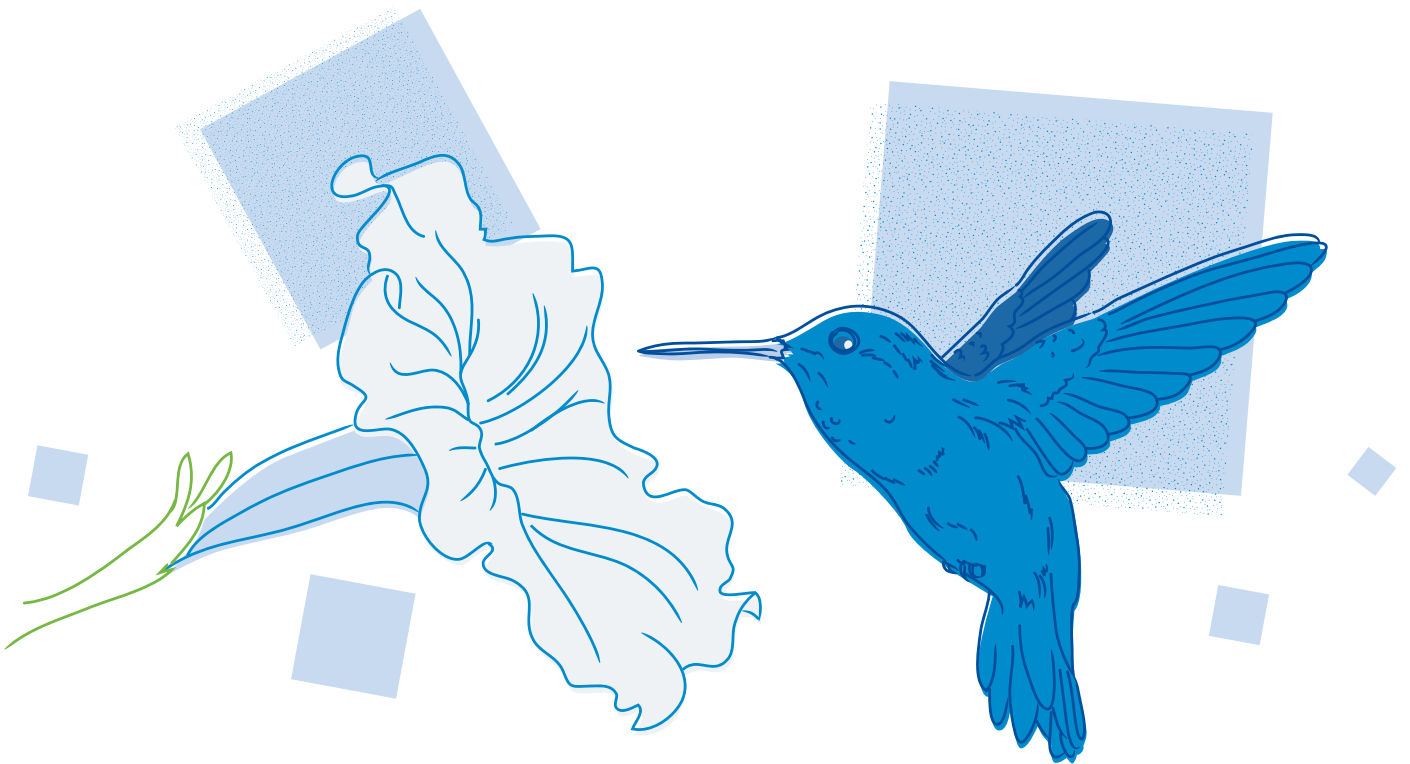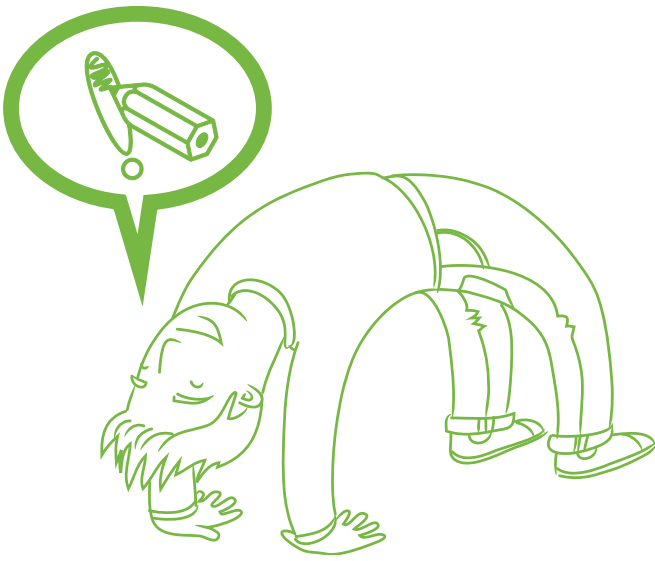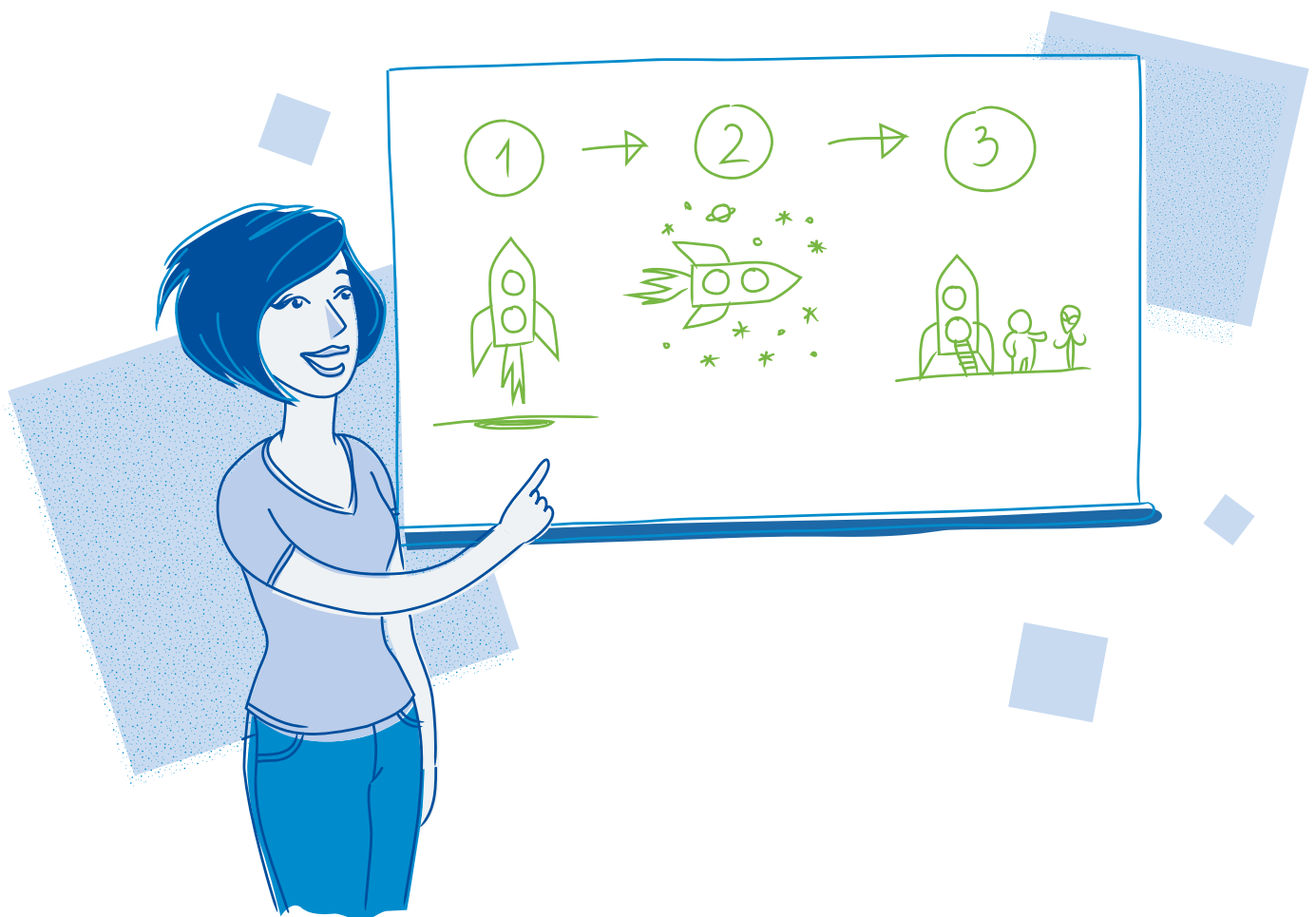
General approach and methodologies

As you already know, we're an agile organisation and we try to implement this mindset everywhere, not only in the delivery-related teams. Therefore, you can see the Scrum or Kanban boards in almost every room.

Though, these methodologies have been implemented to the largest extent in development. Obviously, the degree of agility is closely related to customer awareness. Therefore, our customers frequently work with the external consultants we've recommended in order to understand what it's all about. Building customer awareness is also one of your principal tasks.

You've certainly had a situation when your customer said – "We use Scrum!", and then asked you for tons of documents and concluded that the PO has no time for us. It also happens in our company and our task is to eliminate it.

However, we do realise that Scrum itself is not enough when talking about the enterprise class delivery. In such a case, we fall back on something more complex, e.g. DAD or Scaled Agile Framework[3]. Such frameworks provide us with tools supporting the delivery of large programs. The key to project success is selecting the appropriate team form and elements of methodologies/ frameworks that match the solution for a specific business case. We've verified it in practice and this is your next task.

Tools

We usually use JIRA/Project Server or TFS[4]. Sometimes these tools are on the customer's side, sometimes on ours. Sometimes there are completely different tools, sometimes there are no tools at all and you need to propose something.

In each case, please remember that these are only tools. If you lead the project on paper in such a way that the customer is happy and you are able to monitor the progress, we give you our blessing. Obviously, you need some basic project metrics, e.g. for the PA process but it's up to you and the customer how you define the project tools.

Process – take it easy and before you have a heart attack, read on

Yes, a "process" may sound unpleasant but if it's suitably flexible and simple, it may be very helpful.

Therefore, we've created several such processes that meet these requirements. If in your opinion one of the steps in any process is pointless, outdated or obsolete – tell us about it – we'll change it immediately. The processes are supposed to systemise our work, not to disturb or turn off thinking. In here, we'll not go into details about the processes. We'll talk about it some other time[5].

[4] You will learn more about the tools during the implementation meeting and from the Tribe Master/Team.

[5] Collected processes concerning out work can be found here:
http://intranet.objectivity.co.uk/Quality/SitePages/Develop%20Solution.aspx

Project launch

The first step is drafting a ==PID (Project Initiation Document).==

This term is borrowed from the PRINCE2 project methodology. It's nothing else but a document that describes a project. There is a template[6] that may be used for this purpose. Yet, every project is different so it would be unreasonable to expect that all elements of the template would always fit. The purpose of drafting a PID is to define the aim we want to achieve and the manner how to achieve it. Sometimes, it'll be a high level backlog with rough estimate and sometimes a team proposal within a set time. Thus, the PID may have a freely chosen form and content. It's the basis for project progress monitoring (in days, Story Points, sprints or flowers, any of those as expected by the customer) so the basic project metrics must be included in the PID. If you draft a PID, you must confirm it with the customer. Various values may be drawn from such confirmation – e.g. a customer usually reads documents before signing, so you may be sure that the customer has looked into our proposal at least once.
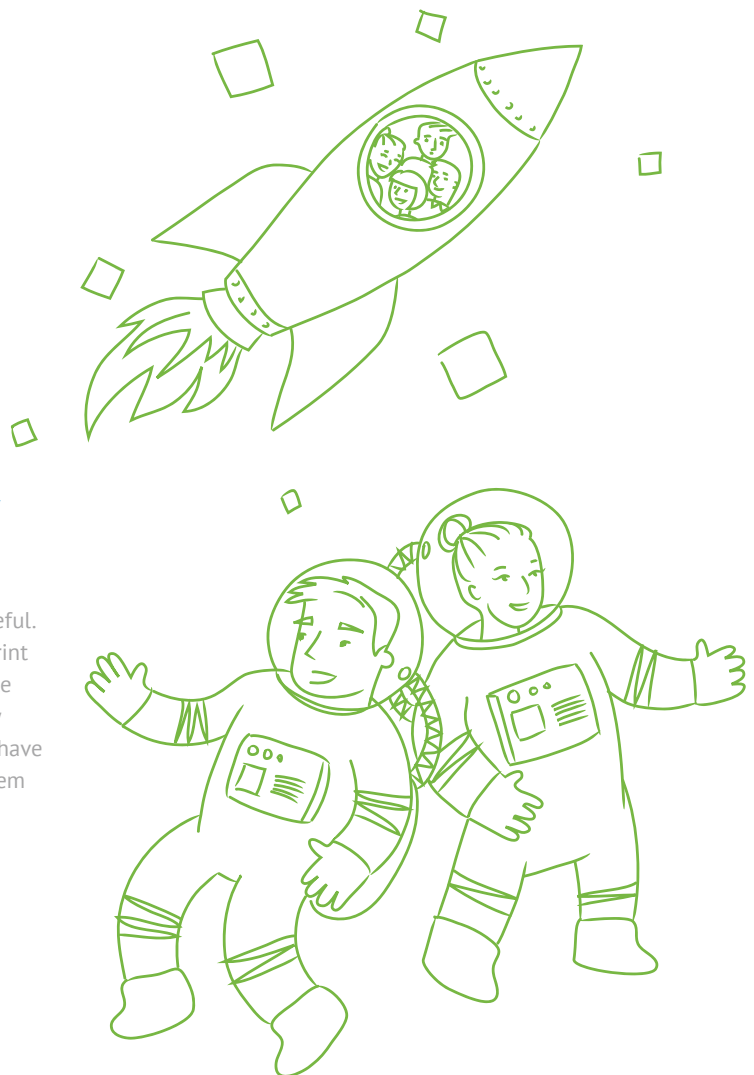
Having drafted the PID, you know more or less what you want to do, what team you want to use and within what time frames. The only thing left is to organise the kick-off meeting. It's the kind of a meeting in which, together with the customer and your team, you tell each other what you want to reach in the project and how. It's very important to engage the customer and make them share their vision with the project team. It's an excellent opportunity to get to know each other better, so either invite the customer to us or pack your team and go on a trip. Please remember that nothing is better than the time spent face to face, so try your best to have it.

Certainly, your project or program may require some other documents or meetings but you'll find it out specifically during the first meetings with your team and the customer.

Project – continued

From now on, it's downhill all the way. Everybody knows what to do and when, now you need to put it into practice.

At this stage of the project, your Scrum knowledge will be useful. Right now, it's pointless to dwell on what is daily-standup, sprint planning or retrospective because it's the subject of a separate training. If you need additional support in this matter, we may provide it to you. Most importantly, your team or another PM have probably gone through this subject more than once, so ask them for support. In an extreme case contact the Guild Master PM, they'll surely do something about it.

[6] You will find PID template here:
http://vmportal.objectivity.co.uk/Quality/QMS%202014/Templates/T%2037%20Objectivity%20PID.dotx

6

Some practices/elements that differ from standard Scrum – a few words about them

PMO – Project Support

It is a role that you might not have dealt with before. These are the persons, who provide support in your everyday work.

They'll help you draw up the reports (daily burn up/burn down/ Project Assurance), prepare any Excel you need concerning your team or provide support in a meeting by taking minutes. You must work out the precise scope of assistance with such person. Every project is different so the requirements will be different. Meet this person at the beginning of the project, talk about your cooperation and agree how you may help each other. At the beginning of each project, this person will be introduced to you by PMO Guild Master.

Project Assurance

This is also one of our inventions. You'll be provided detailed training in this subject but it's worth saying a few words on what it's all about.

Well, what we wanted to achieve is to agree a weekly project status based on a standard. Therefore, once a week, you'll meet someone from the PA team and talk about your project. It's very similar to the code review that we practise in development. In our opinion, it may be very helpful if someone from the outside looks at the project. This may open your eyes to things, which you haven't thought about yourself. Please remember, it's not about controlling, it's about supporting.

Apart from all this you've read so far, there's plenty of other things, impossible to discuss here. Most probably, you'll not learn everything in the series of inductions/training that is ahead of you. Therefore, please remember that this knowledge is somewhere around you and it's enough to ask for it. One of the cardinal sins is assuming that something is true instead of asking a question. We're all here for you and willing to help you, so try to use it.

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Wow! It seems like it's all about projects, so let's sum up...

The role of the Project Manager, your role, is very important in our company.

You shape the cooperation with the team and the customer. You are our face to the customer and you're responsible for our image. Our development is heavily dependent on you because you establish the relationship with the customer and the team. Therefore, every time you make a decision, please consider how it will influence us as a company and the customer and whether it's the best thing we can do. If not, do everything to make it best.

Notes

www.objectivity.co.uk