THE MARKETER'S GUIDE TO GETTING IT ALL DONE

Strategic Project Management Hacks

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DIRECTOR OF OPERATIONS

Is all the work you're doing the best course of action given the constraints you have with time, money, and people? How much of the work is worth it? Especially when your boss, your client, or your customers insist it's ALL important… and that it should all happen NOW NOW NOW?

It's enough to make you bang your head (or your Project Manager's head) against a wall.

So in the interest of saving you the expense of drywall repair, let's walk through a system of focusing your energy on the things that matter.

So you've got a pretty good handle on delivering and capturing all of those to-do's in whatever tool your Project Manager pushed on you and you grudgingly went along with. But something's missing, because there's a feeling in your gut that things could – and should – be even better. And after much deliberation with your team, you come to the conclusion that your next step in growing your account or your business at this point isn't really execution, it's prioritization.

WHY SHOULD I BE READING THIS GUIDE?

You'll walk away understanding an effective, holistic approach to marketing project management. You'll know how to align your work to make sure you're getting the right things done. Ultimately, this eBook's purpose is to help you grow your accounts or your business in the right direction.

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START WITH THE RIGHT QUESTIONS

YOU MIGHT CALL IT:

- Your "KPIs" (key performance indicators)
- Your "Critical Numbers"
- Your "Balanced Scorecard"
- Your "Oh @#$%! Numbers" (i.e. the numbers that scare you when they move in the wrong direction for too long)

KPI'S

What ever you call it – at some point you define what's important to the account, to the business, and to yourself. We focus on the quantitative approach here because even though some of the numbers might be subjective, there is a lot of credence to the Drucker philosophy that if you can measure it, you can manage it.

Finding those numbers usually boils down to knowing the answers to the following questions:

1. What are you trying to achieve, and why?

2. What are you trying to avoid, and why?

3. How will you measure when you're moving in either of those directions?

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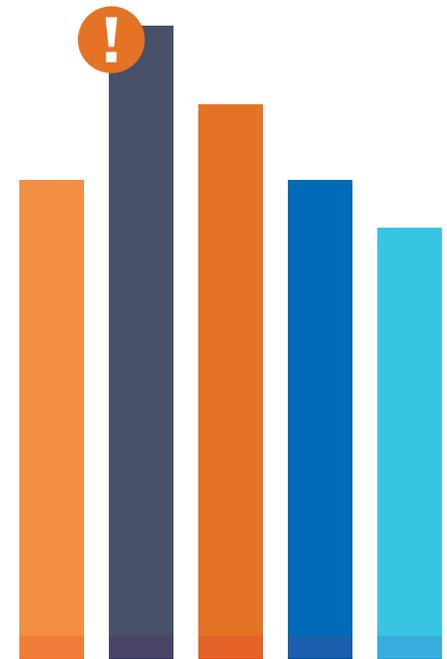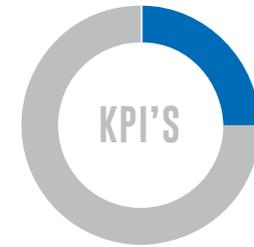
WHAT ARE YOU TRYING TO ACHIEVE, AND WHY?

We ask this question to clarify our vision, our goal, our purpose. The "why" in there is innocuous but important, because it helps clarify the truth of what we want to achieve.

WHAT ARE YOU TRYING TO AVOID, AND WHY?

Strategy is as much about what we won't do as it is about what we will, so we ask this question to define our "nots" – our project constraints. This helps us narrow our focus to what is worth focusing on, as well as give ourselves the appropriate parameters and constraints for how we get there.

EXAMPLE:
TIME TRACKING
IMPROVEMENT PROJECT

WHAT?

Improve agency time tracking speed.

WHY?

So that we can prevent scope creep based on real-time project cost.

EXAMPLE:
TIME TRACKING
IMPROVEMENT PROJECT

WHAT?

Avoid adding too much administrative time.

WHY?

So that agency-wide utilization rates don't drop as a result.

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HOW WILL YOU MEASURE WHEN YOU'RE MOVING IN EITHER OF THOSE DIRECTIONS?

While many of us have an idea of what we want and don't want, this is the piece most often overlooked, partly because it can be a challenging exercise. But when we don't define measurement and make sure there is a way of measuring, we're left guessing and grasping at straws. Measure it subjectively if need be, but measure nonetheless.
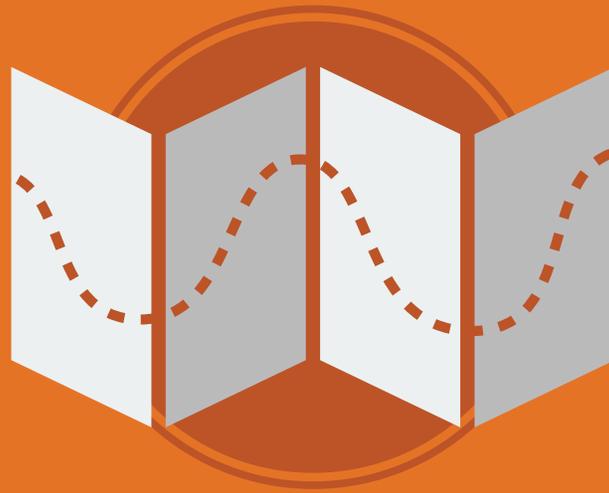
**EXAMPLE:
TIME TRACKING
IMPROVEMENT PROJECT**

MEASUREMENT

Average latency of time tracking entry is within 5 business days.

MEASUREMENT

Utilization rate does not decrease by more than 5%.

MAP THE IMPACT

An impact map for a fictional business. In this section, we'll walk through how to create your own.

Category	Metric	Weight (1-10)	Measurement Method	Score (1-5)	Project Impact Estimates				Total Attention to Metric
					Project #1	Project #2	Project #3	Project #4	
Sales	Lead Pipeline	8	# of leads generated per source over 12 month period	3	100		25		125
Sales	Lead Quality	8	% of leads converted to opportunity	2	25		25		50
Sales	Opportunity Pipeline	9	# of opportunities generated per source over 12 month period	3			10		10
Sales	Win Rate	10	% of opportunities won	4			10		10
People	Leadership Efficacy	7	Avg. Score from Team Surveys	3		10			10
People	Morale / Engagement	7	Avg. Score from Team Surveys	3					0
People	Development	6	# of learning opportunities completed	4		25			25
Client Services	Client Satisfaction	10	quarterly discussions and feedback sessions with client	2		10		100	110
Client Services	Account Performance	8	Avg. project grade by team lead	3		10		25	35
Client Services	Client Retention	10	Checkbox / subjective evaluation for reason last	5	10	10		5	25
Client Services	Project Scope Balance	7	% of projects within budget hour targets (per product)	1		10			10

Total Weighted Impact of Projects: **1100** | **570** | **590** | **1250**

Category	Metric	Weight	Measurement Method		Project #1	Project #2	Project #3	Project #4	
Mitigating Project Factors	Cost	5	higher score for lower costs		5	5	5	5	
Mitigating Project Factors	Urgency	10	higher score for higher urgency		10	5	100	5	
Mitigating Project Factors	Bandwidth Requirement	8	higher score for lower commit level		25	5	5	5	

Vertical Project Scores: **1425** | **685** | **1655** | **1365**

Impact Scoring:
5	Minor Impact
10	Moderate Impact
25	Major Impact
100	Critical Impact

Assign an impact score to each project based on these options.

Using these options, assign a score to each mitigating factor.

Project Factor Scoring:
5	Minor Factor
10	Moderate Factor
25	High Factor
100	Critical Factor

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Now that we've laid the foundation for success by knowing (1) what's important and (2) how you'll measure progress, we make sure that we put our money – and our time and other resources – where our mouth is. At BFO, we call this impact mapping.
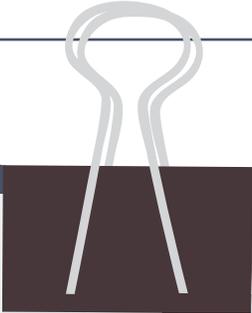
After defining your KPIs (metrics and measurements), do the following:
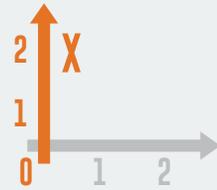
1 Weight the KPIs by assigning a score of 1-10, with 10 being the most important to the business. The weighting of each metric is subjective and heavily influenced by your values, and should be vetted by your team.

2 Cross-evaluate how your projects align with those KPIs.

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VERTICAL EVALUATION

How Important is each project to your business?

In the vertical evaluation, we examine the relative importance of potential and/or active projects based on the breadth and magnitude of the impact we expect it to have to the agency's KPIs. In the example on page 9, Project #4, a Client Services-oriented project, has a huge impact on a top-weighted KPI, while Project #1, a Sales-oriented project, has less of a widespread impact in terms of both breadth and magnitude.

But when we consider some of the additional project factors, we see that (other factors being equal) we have a critical urgency on Project #3, so that gets moved to the top of our launch/ priority list, regardless of the relatively low weighted impact of the project. It's a way of accounting for all the components of the decision – importance, practicality, and feasibility.

HORIZONTAL EVALUATION

*How much attention does each KPI receive across projects?*
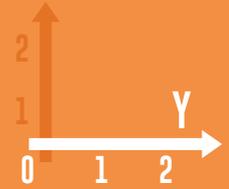
Evaluate to what degree projects are addressing each KPI. In the horizontal evaluation, we look at metrics that we decided were important and check how much attention they are being given by potential and/or active projects. In the example on page 9, a glaring missed area is Project Scope Balance, which has a pretty high importance, yet a low score, and is being given almost no attention from projects.

It would be at this time that the owner of this metric (the Account or Project Manager) is tagged to start thinking about initiatives that may address this metric. Comparatively, Win Rate is one of the highest weighted KPIs, but the score is above average, so we would be a little more comfortable with only giving this a moderate level of attention until our weak points are patched.

Although the example on page 9 was for an enterprise-level assessment, you can adapt this down to individual campaigns or accounts that have multiple KPIs that need to play nice with each other and make sure that your subprojects align in the same way. For marketers, this also helps if you're dealing with a client that seems to be making decisions that don't align with what the numbers say.

Often, this is a case of not understanding the entire system of factors that come into play — essentially their mitigating factors. But when you make that a component of your evaluation and recommendations, you and your client can get on the same page priority-wise and have an awesome working relationship.

Making KPIs a component of your evaluation and recommendations means you and your client can get on the same page priority-wise and have

AN AWESOME WORKING RELATIONSHIP.

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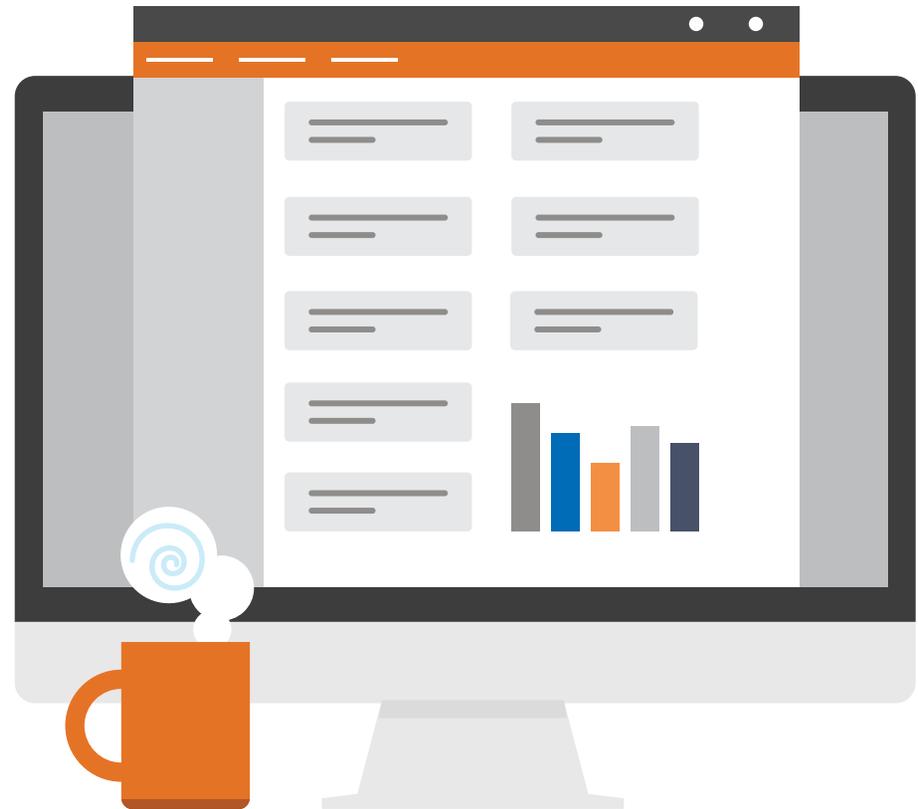
GET IT DONE

Now that you've decided what's important, and figured out what things contribute to success on those KPIs, you're ready to execute.

There are already a ton of best practices and wisdom out there on project planning and execution, so rather than try to cram all of that into this one document, I'll just share a few guidelines I like to follow that you can start using now. Note that I'm deliberately using the term guidelines rather than rules.

FOLLOW THESE GUIDELINES:

1. If you have more than 3 priorities, you have no priorities.

2. Done is better than perfect.

3. Change is an event, not a discussion.

4. The plan is nothing; planning is everything.

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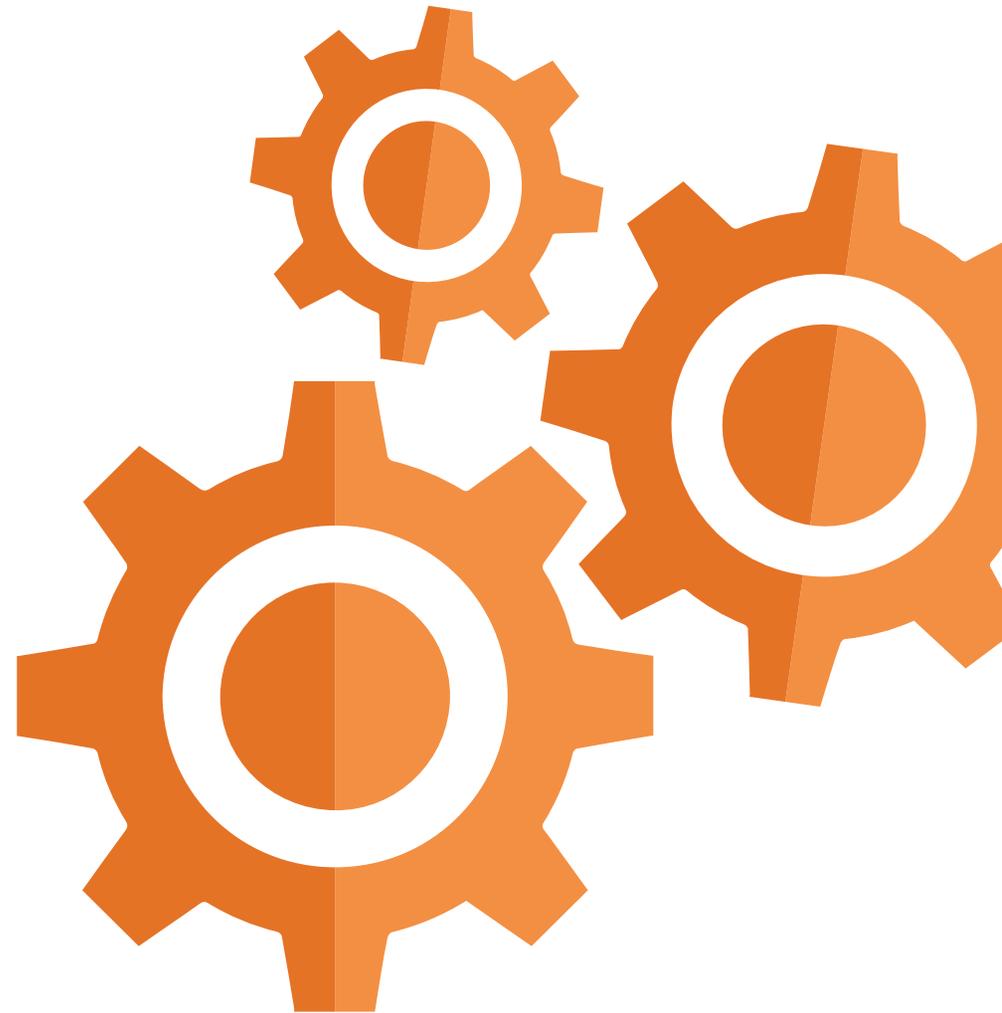
GUIDEINE

1

IF YOU HAVE MORE THAN 3 PRIORITIES, YOU HAVE NO PRIORITIES.

While you can have a fair amount of KPI's, most of those will tie in to overarching priorities. In the example above, that company seems to have 3 priorities: growth, culture, and service. As the company scales, the owners of those individual departments can have their own priorities. The Sales Manager can be responsible for revenue and relationships, the Team Leads can focus on morale, training, and career development, and the Client Services Director can focus on client happiness, retention, etc.

GUIDEINE

2

DONE IS BETTER THAN PERFECT.

Oh, how hard this lesson was for me when I was a young, process-oriented project manager who wanted everything to be perfect, damn the constraints and contexts! But evolving beyond that hasn't allowed me to really avoid getting lost in the forest for the trees. So while I'm still not always a fan of a "ready, fire, aim" approach, I have come to respect the notion of making a decision and moving on. Avoid analysis paralysis, take some time to think things through, but pull the trigger. You can do all the overthinking you want as long as the project is moving and the overthinking is used to tweak the success of the project, rather than expanding or changing the scope of it.

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GUIDEINE 3

CHANGE IS AN EVENT, NOT A DISCUSSION.

It's pretty easy to fall into a habit of having brainstorming meetings where your team pats themselves on the back for a job well done, only to ask in a few months, "Hey, whatever happened to doing xyz?" Force yourself and your team to truly define what "done" looks like, if that's the point of the discussion. If you don't like how a team or a process is being run, then spend some time envisioning the ideal or the next step with a basic gap analysis. And then make it happen.

GUIDEINE 4

THE PLAN IS NOTHING; PLANNING IS EVERYTHING.

I know, I know. Admitting this is near blasphemy for a project manager. But as we learn from experience, nothing ever goes according to plan. Someone quits, we run out of money, a major client fire requires all of our attention, and your project gets put on an indefinite hold. Even with all of our best foresight, we run into obstacles. Work your plan the best you can, and adapt it to the obstacles along the way. But don't consider it a failure and prematurely kill your project when you have to make detours from your original plan.

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PUTTING IT ALL TOGETHER
Rolled up, the entire method looks like this:

START WITH THE RIGHT QUESTIONS

Define what's important to achieve and avoid

◆

Specify how you'll actually measure success

MAP THE IMPACT

Prioritize projects based on how they impact and address KPIs

◆

Look for gaps in low performing KPIs that don't have enough project-based attention

GET IT DONE

Don't juggle too many things

◆

Focus on done

◆

Adapt

With this holistic approach, you've aligned our work to make sure you're getting the right things done and ultimately growing your business in the right directions – as it has for us.

NO PROJECT MANAGERS WERE HARMED IN THE WRITING OF THIS eBOOK.

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If you'd like our help in aligning your digital marketing efforts with your business goals, contact BFO today to set up a free "project therapy" session.*

GET PROJECT THERAPY »

*We can only half promise not to start our session
with an Austrian accented "Vat seems to be ze problem?"