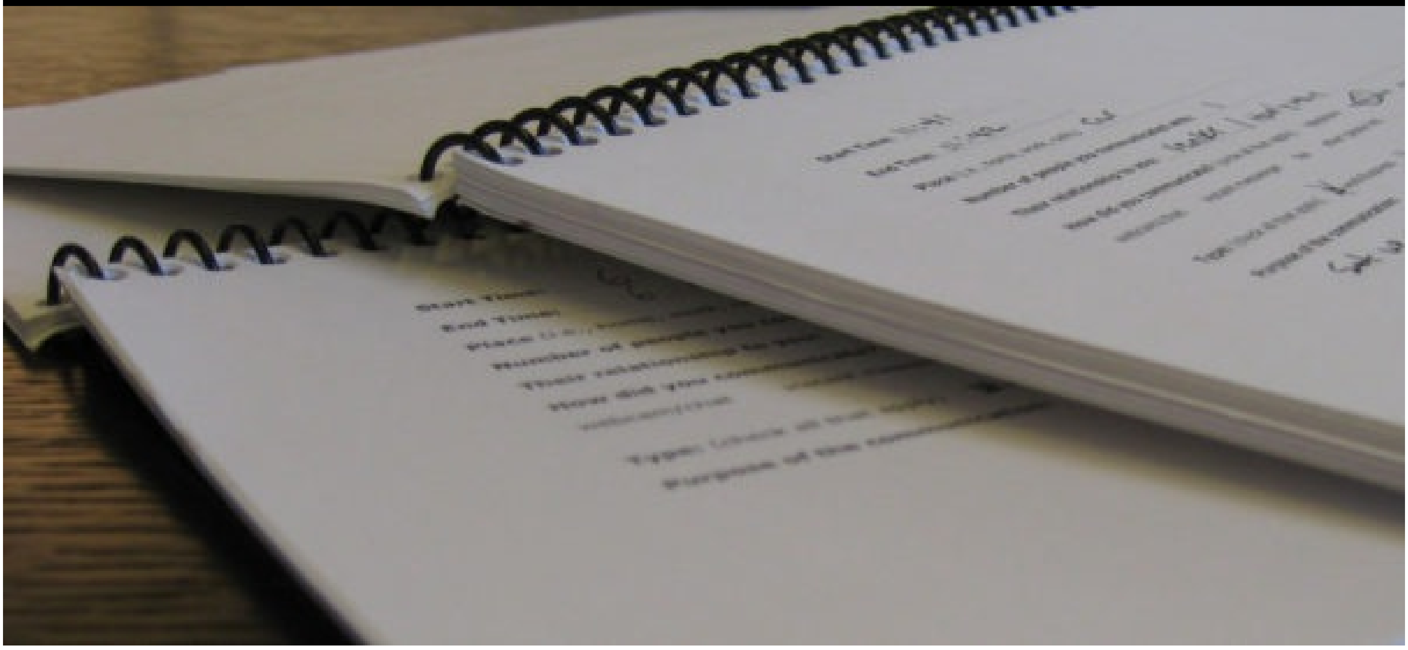
blink



Apr 17, 2014

Holistically Measure Projects in Just One Page: Part 2

In aiming to make a digestible but comprehensive summary, I knew I needed it to be visually clean yet detailed. I wanted to use the functionality of Excel, but I didn’t want it to look like a spreadsheet when it was printed.

By Sarah Amos

In my last post, I wrote about narrowing my focus as I sought to achieve my goal of increasing project transparency at Blink. I wanted each person to know where we “ended up” on a project, a goal widely shared among both large and small consulting firms.

In aiming to make a digestible but comprehensive summary, I knew I needed it to be visually clean yet detailed. I wanted to use the functionality of Excel, but I didn’t want it to look like a spreadsheet when it was printed. I wanted that supporting data to be easy to trace – so other people could figure out where all the information came from on each project – but not overwhelming to the casual reader.

The Summary Sheet needed to focus on the bigger picture, not “just” the financials. With that in mind, I began with the high-level learnings: What went well, and what could go better? In the template, I created a bullet point list that would be filled in during a wider team discussion.

Below those high-levels, I put a mad-libs style sentence where we tied the projects outcomes to the Blink vision: **how did we change the world, and for whom?**

After the wrap up, I created a “Project Stats” section, where I really let myself nerd out. I thought about the metrics that would matter to our delivery teams, and focused myself on duration and scope. How long did this project take? How long did we think it would take? I listed out the deliverables according to the SOW, and made an area where the project manager (who would fill the in the sheet for each of her recently wrapped projects) could fill in what we actually delivered.

Budgets are nothing more than a plan, sometimes a better conceptualized plan than other times. My goal was to look at what we thought would happen, what really did happen, and allow an easy way to compare, understand, and explain any variances. I also included some Blink-specific and CFO-favorite metrics, like Rate per Hour. Our company has a targeted Rate per Hour, and while it is a metric that doesn’t always resonate with, say, a researcher, it would really make sense for Karen, our CEO, or Lauren on our Biz Dev team.

Then there’s a metric that our CFO doesn’t really care about, but our Biz Dev & PM teams really are excited by: The “Next Time SOW” amount. **If we did this project again, what would we charge? What’s realistic?** If we knew a certain rate per hour was appropriate (and this is usually the same rate we planned the original project to hit), and we knew the hours the project would take (because we just DID the project), and we now know our expenses (hindsight 20/20 and all!) This means that we have a gut check of what this project “should” cost on our next scope of work. Maybe it’s too high for our client to pay. Maybe we have learned efficiencies so we can bring that number down. It’s all good – let’s write it down and talk about it. This number gives us a place to begin that conversation.

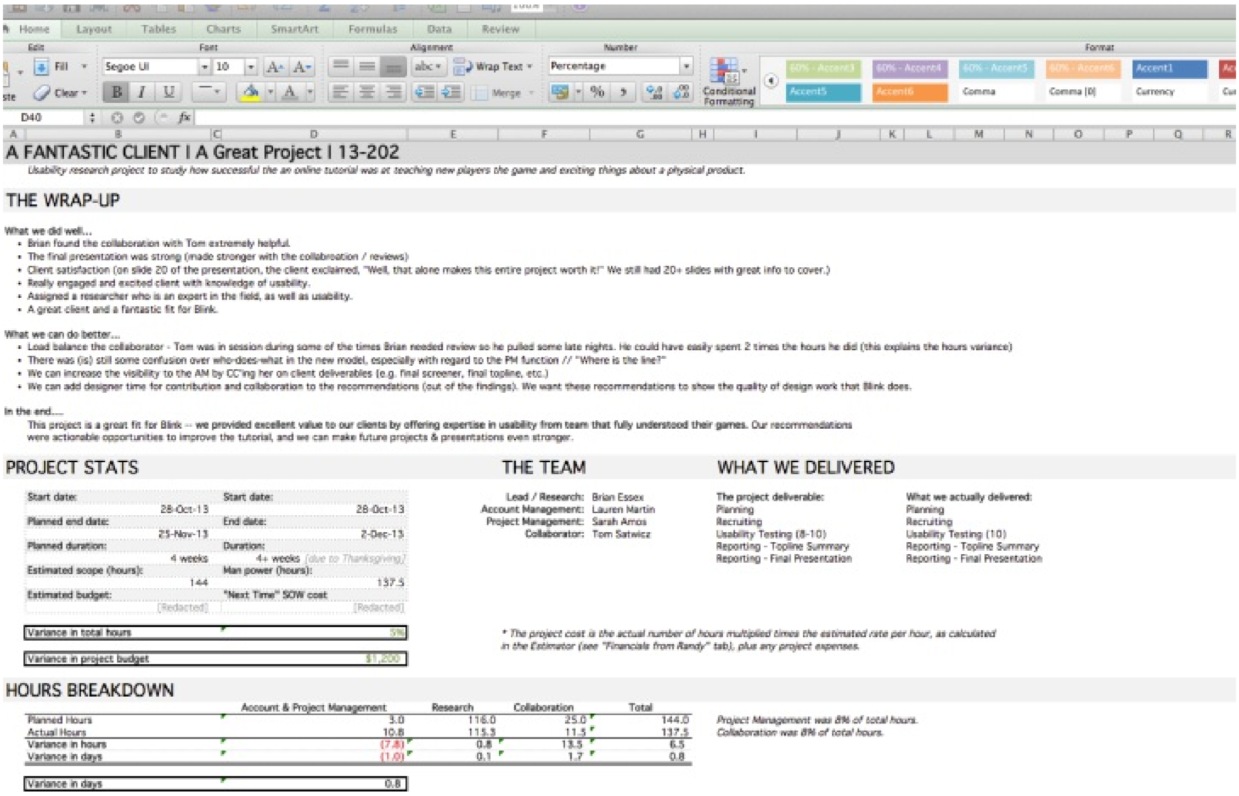
Below the project stats and Next Time SOW costs, I broke out hours by roles so we could see where we were under or over-scoped, and where we could possibly be more efficient in the future. Our teams have found this extremely helpful as a way to dig deeper into a simple overage in hours. Was PM time totally over? Why? Did the client need some extra attention? Was research time under? Because we thought it would be a more complicated study then it ended up? All of these data points were really ways to increase the conversation that would occur when the team gets together to discuss the project.

The financials were included to show how the project ended up from that perspective, but also as a tool to deepen the conversation around what the team thought of the project. Were we under scoped from the beginning? Wait, do we always under scope hardware prototype research projects? Let’s change it!

Now comes the absolutely critical phase: We take the team out for coffee or lunch (leaving the building is key!) and have an honest and positive conversation about how our work went. Through these conversations, we populate the more qualitative “what went right” and “what we can do better” summaries. We bring everyone’s perspective to the table (literally) and have time to discuss the ins-and-outs of the project and make sure to include everyone’s perspectives and individual feedback.

After the PMs have collected several datasheets, we’ll get together and discuss overarching themes and bring those forward in our company meetings. We’re learning from each project – the good, the bad, and the ugly – and making sure those learnings are allowing us to have even better project and client relationships in the future.

In the end, these Summary Sheets did more than measure each project. The small exercises of filling in an Excel spreadsheet taking an hour outside the office with the team has had far reaching implications. We now have a dedicated opportunity to speak with each team member and solicit their viewpoints. We are diligent in asking clients for feedback. We can more easily and accurately identify trends, core competencies, and areas for improvement across the company. It’s a simple reminder of how powerful a thoughtful, flexible, adaptable process can be in supporting the day-to-day operations of a busy, growing, firm.



A FANTASTIC CLIENT I A Great Project I 13-202

Usability research project to study how successful the an online tutorial was at teaching new players the game and exciting things about a physical product.

THE WRAP-UP

What we did well...

- Brian found the collaboration with Tom extremely helpful.
- The final presentation was strong (made stronger with the collabroation / reviews)
- Client satisfaction (on slide 20 of the presentation, the client exclaimed, "Well, that alone makes this entire project worth it!" We still had 20+ slides with great info to cover.)
- Really engaged and excited client with knowledge of usability.
- Assigned a researcher who is an expert in the field, as well as usability.
- A great client and a fantastic fit for Blink.

What we can do better...

- Load balance the collaborator - Tom was in session during some of the times Brian needed review so he pulled some late nights. He could have easily spent 2 times the hours he did (this explains the hours variance)
- There was (is) still some confusion over who-does-what in the new model, especially with regard to the PM function // "Where is the line?"
- We can increase the visibility to the AM by CC'ing her on client deliverables (e.g. final screener, final topline, etc.)
- We can add designer time for contribution and collaboration to the recommendations (out of the findings). We want these recommendations to show the quality of design work that Blink does.

In the end....

This project is a great fit for Blink -- we provided excellent value to our clients by offering expertise in usability from team that fully understood their games. Our recommendations were actionable opportunities to improve the tutorial, and we can make future projects & presentations even stronger.

PROJECT STATS

Start date: 28-Oct-13	Start date: 28-Oct-13
Planned end date: 25-Nov-13	End date: 2-Dec-13
Planned duration: 4 weeks	Duration: 4+ weeks *(due to Thanksgiving)*
Estimated scope (hours): 144	Man power (hours): 137.5
Estimated budget: [Redacted]	"Next Time" SOW cost [Redacted]

Variance in total hours	5%
Variance in project budget	$1,200

THE TEAM

Lead / Research: Brian Essex
Account Management: Lauren Martin
Project Management: Sarah Amos
Collaborator: Tom Satwicz

WHAT WE DELIVERED

The project deliverable:	What we actually delivered:
Planning	Planning
Recruiting	Recruiting
Usability Testing (8-10)	Usability Testing (10)
Reporting - Topline Summary	Reporting - Topline Summary
Reporting - Final Presentation	Reporting - Final Presentation

** The project cost is the actual number of hours multiplied times the estimated rate per hour, as calculated in the Estimator (see "Financials from Randy" tab), plus any project expenses.*

HOURS BREAKDOWN

	Account & Project Management	Research	Collaboration	Total
Planned Hours	3.0	116.0	25.0	144.0
Actual Hours	10.8	115.3	11.5	137.5
Variance in hours	(7.8)	0.8	13.5	6.5
Variance in days	(1.0)	0.1	1.7	0.8

Variance in days	0.8

Project Management was 8% of total hours.
Collaboration was 8% of total hours.