Week 4: Managing to Completion

Lesson 1: Welcome to Week 4

Segment 1: Managing the Project

Congratulations, you've crossed the halfway point of this course. You've spent the past three weeks learning about project management and establishing a Proposal for your course project. You'll spend this week and next week managing your project to completion.

You're likely reviewing the course outline, noting the amount of time spent on each topic and wondering – why does this course devote only two weeks on the actual *managing of the project*? Three weeks were spent planning it – and the last week is spent with team and client management issues. Is this how a project runs too?

Yes, and No. A larger amount of the project duration occurs while the team is executing the project, i.e. developing the multimedia product. During that time, the project manager should be able to check status, provide leadership and manage – not do.

So NO, from the *team's perspective* because the majority of their time on the project is in developing it. But YES from the *project manager's perspective* because the majority of their time is spent planning the project and then managing the team and client during the execution of the project.

Thus, reflecting the project manager's role on a project rather than a team member's role, these next two weeks provide an overview of the steps your team should be taking to accomplish the project.

Sidebar: Before designing and programming your multimedia presentation, you must have the following in place: a process, timeline, budget, scope, team, resources, and contracts.

Proceed to the next page to review this week's activities.

Segment 2: Accomplish This Week

Because your team members carry out the project, the next two weeks is more about what the team *should be doing* rather than the project manager. You will be given the opportunity to create a few of the key deliverables during this stage, although in most cases team members typically create these documents. This is so that you become familiar with and are able to judge the quality of these deliverables when created by your project team.

As you recall from the process discussion, the Proposal often signifies the end of the Plan phase of a project. The project then moves into the Design, Develop and Deliver phases. This week you will focus on the Design phase, and next week you will manage the project through the Develop and Deliver phases.

This week, to complete the Design Phase, you will:

- Write the Creative Brief.
- Develop a navigational flowchart and a content matrix.
- Writing a Technical Requirements document.

Next week, during the Develop and Deliver phases, you will:

- Discover and discuss production techniques for the integration of the assets.

- Respond to a client issue and adjust your timeline, budget and scope accordingly.
- Write a Test Plan for the project.

During the week you will also learn about monitoring the project for quality, timing and budget issues. And you'll review the warning signs that indicate a project is going astray.

SIDEBAR: A general multimedia process follows four phases: Plan, Design, Develop and Deliver. Return to Week 1 to review these phases if they are unfamiliar to you.

This week begins when your client accepts the proposal and says, "GO." Proceed to the next page.

Lesson 2: When the client says GO… It's time to Kick-Off

Sometimes a length of time passes between delivery of the Proposal and client acceptance of it. Weeks and even months can pass before you receive the elusive "go" from your client. Now, what do you do first?

First, pull your project team together for an internal "Kick-Off Meeting." Prior to the meeting, distribute the Proposal and all the detailed documentation created during the writing of the Proposal. Next, establish an Agenda for the meeting. Successful meetings begin with well-thought out agendas. You will learn more about successful meetings during the last week of the course.

During the Kick-Off meeting you should review and validate:

- Client and Project Goals – Outline briefly for the team what the client is trying to achieve.
- Project Scope and Deliverables – Are all last-minute client changes are reflected in the document?
- Timeline – Are there new issues with meeting the deadline?
- Budget – Has there been any changes with fees, resources, contractors, or materials?
- Team – Is everyone still available? Do you need to make any changes to the team?
- Responsibilities – Does everyone know their role and what deliverables they are responsible for?
- Outstanding Issues – Any questions? Any other issues that should be discussed?
- Next Steps – Review the immediate steps and distribute task lists for the upcoming week.

After the kick-off meeting, typically the team jumps begins the Design phase of the project. To ensure a successful Design Phase, the team should have a Creative Brief to begin.

Sidebar: Even if your client says "Go" immediately, a Kick-Off Meeting is still important. During this meeting the team should validate the Proposal and establish responsibilities – two important factors to getting the project off to a good start.

Go to the Assignments for Day 1. After you complete the assignment, you can proceed to the next page to learn about writing a Creative Brief.

Go to Day 1 Assignments. Reading Chapters 6, 7, 8, 9 pp.118 – 187

Lesson 3: The Design Phase

Your have competed the Plan phase of the project. You're about to embark on the Design Phase. This is where your teams select the content, visuals, video and audio elements. During this phase the team is storyboarding, diagramming and designing screens.

There are many methods to beginning the Design Phase of any multimedia project. Your textbook begins with the content and then proceeds to designing of the interface. A more common method is to establish the "creative" needs for the project. This is typically done through the writing of a Creative Brief. Neither method is correct. Both are useful in different situations.

For example, the development of a CD-ROM based encyclopedia, which is content-heavy, would benefit from the content-first approach. On the other hand, a graphical, animated trade-show kiosk would benefit from the creative-first approach.

The Creative Brief is very similar to the Strategy Brief – but this time you are focused on the target audience and how the creative elements of a multimedia piece would appeal to them. The creative elements include: look and feel, visual design, content format, writing tone, style of audio or video clips, typography, and the "experience".

Different companies handle Creative Briefs very differently. In most companies, the project manager or "account executive" will write a short one-page brief providing the creative direction as specified by the client or uncovered in the research. For other companies, the Creative Brief is a more detailed document written by an Art Director, Content Manager or other creative person. It provides an in-depth understanding of the creative elements and the experience the user should have.

Again, both methods are useful in different situations. You needs to assess your project's needs and determine which version is best suited for your project.

Sidebar: There are many formats for Creative Briefs, use what works best for your team and the project. Explore a template from Macromedia, Creative Brief Sample (http://www.macromedia.com/resources/techniques/resources/define/sample_creative_brief.rtf)

Segment 1: Writing the Creative Brief

The Creative Brief is written to help the creative team better understand the project, the target audiences and the client's goals. While much of this information is in the Proposal, you are helping to focus the creative team on their immediate tasks by pulling out the pertinent points and presenting it to them in a short format.

Creative Briefs may vary from one page to three or four – but they should never exceed a few short pages. Keep the writing brief and very focused. Provide only the information needed to embark on the creative phase of the project.

To the right, you can access two Creative Brief templates. While one has more detail, they both focus on the following:

- Project objectives – What are you trying to achieve? What will be the end result?
- Target audiences – Who are the users? What are their needs?
- The experience or actions of the user – How do you want them to interact? What will be their take-away after using the product?
- Creative or technical consideration – Are there existing guidelines or assets? What are the technical constraints? Are there design constraints?

Sidebar: Sample Creative Briefs (link to two Word docs)

After writing the Creative Brief, your team will begin embark on the Design Phase of the project. The art director, content manager, information architect and technical lead may all begin working collaboratively and concurrently on the design of their component.

For example, they may have a team meeting to discuss the interface design and how the user would navigate the site, what content they would access, and what interactive features are available. After that meeting, each person develops his or her portion of the design. The art director may begin creating visual screen layouts, the architect would create a navigational flowchart, the content manager would begin a content matrix, and the technical lead may investigate Lingo scripts for the interactive features.

Go to the Day 2 Assignments. When you have completed the assignments, proceed to the next page to begin reviewing the Design Phase.

Day 2 Assignments. Write a Creative Brief and discuss.

Segment 2: The Visual Design

At this stage, your team is working on their assignments, but should be collaborating on the materials. Individuals should not be creating in a vacuum. For example, it is the Art Director's responsibility to create the screen concepts, but he/she could not do that without input from the rest of the team.

Monitor and discuss the project with your team, if you find that the Information Architect does not know the status of the screen concepts, then that is a clear indicator that they team is not collaborating. If this is the case, pull the team together and facilitate a few meetings during which they share and collaborate on the project design.

The Art Director creates the visual design of the multimedia product using a tool such as Adobe Photoshop. Most Art Directors will create 3 to 6 concepts, the computer-equivalent of "rough pencil sketches." The concepts will provide a general look and feel – they should not represent the actual navigation or functional layout of the product.

Internally, the team collaborates to improve the concepts and narrow the choices to approximately three. This is not a hard and fast rule. If you have a low budget, you may only present one concept. If you have many great ideas, you may present five or six. How many concepts you create and present is dependent upon your budget, your timing and your team's wishes.

While reviewing the screen concepts, your role is to be objective – not to judge it. Compare the concepts to the Creative Brief, does it address the objectives? Does it comply with any limitations or existing guidelines? Does it clearly address the users' needs? Do NOT ask yourself if you *like* it. Ask yourself, does it meet the users' needs? Make sure the client does the same.

Sidebar: The Visual Design Process (animation about generating screen concepts)

Proceed to the next page to learn about the content management activities.

Segment 3: Content Management

Content management is the coordination of more than just the text for the multimedia screens. Content Management is the process of determining what content is needed, how that content will be obtained, integrated and maintained in the final product. Content includes the categorizing and organizing of all data, assets and other textual elements. In

addition to the text, graphics, audio and video, content management must also consider the other text elements like navigation instructions, form field labels, photo captions, and page identifiers.

The process of content management usually begins with an "information dump" from the client – typically in the form of brochures, press releases, video tapes, product catalogs and other materials in a cardboard box dropped in the content manager's desk. The content manager must read, sort and catalog all the materials keeping in mind if it is applicable to the project.

To manage this task, the content manager typically maintains a document called the Content Inventory or Content Matrix. Although it may take many forms to suit your project, the matrix typically has "identifying categories" across the top such as source, date, owner/author, electronic, filename, applicable audience, who maintains and how, and many others. Down the left hand side runs the specific pieces of content in an outline-like format. This document is used to track the content throughout the process and is crucial for the programmers during asset integration.

The Content Matrix categories across the top can take many forms, according to your projects needs. Explore the link in the sidebar to view two samples.

Sidebar: Content Matrix
http://www.gantthead.com/Gantthead/content/templates/Content%20Analysis%20Matrix.xls

SideBar : Link to Word Document –

Next, go to the Assignments for Day 4. When you have completed the assignment, you can proceed to the next page.

Day 4 Assignment: Develop a Content Matrix

Segment 4: The Information Architecture

Information Architecture is a new and commonly misunderstood multimedia specialty. More commonly associated with web site development, information architects are finding homes within multimedia development firms as well.

According to Jessica Burdman, author of Collaborative Web Development, "An Information Architect understands how to display information visually so users understand how to interact with the site and find information they need. An Information Architect would be responsible for site architecture, navigation, search and data retrieval, and interaction design. As well, the Information Architect would be responsible for key messages to users regarding errors, service, technical needs of the site and privacy messages."1

Information Architects also go by many different titles – Information Designer, Interaction Designer or Interface Designer is common titles as well. In other situations, other team members such as the Art Director or Content Manager may assume the responsibilities of Information Architecture. Regardless of who does it and what their title is, the Information Architecture activities are an important step in the Design phase.

An Information Architect typically works with the Content Manager to translate the Content Matrix into a usable navigation and screen design. They often use a

"navigational flowchart" to visually display and document the screens and how the user would "flow" or navigate through the multimedia product.

Most Information Architects use simple flowcharting symbols commonly found in many desktop software packages such as Microsoft Word, Visio or even page layout programs like Quark Express or Page Maker. The best way to understand a navigational flowchart is view one – use the link in the sidebar to view a sample.

Other tools used by the Information Architects include Functional Storyboards – black and white screen layouts indicating navigation, functionality, content placement and other interactive features. Sometime these storyboards may also be called "wireframes." As with the Art Director, the Information Architect can not do these activities alone and must be collaborating with the entire team while developing the Flowchart and Storyboards. The Sidebar also includes an example of a Functional Storyboard.

Sidebar: Flowchart & Storyboard – link to Docs

Go to the Assignments for Day 5. When you have completed the assignment, you can proceed to the next page.

1J. Burdman, Collaborative Web Development: Strategies and Best Practices for Web Teams, (1999) Addison-Wesley, Boston, MA. Available at http://cseng.aw.com/book/0,3828,0201433311,00.html

Day 5 Assignment: Create a Storyboard, explain your navigation and Usability decisions, and then have a Usability Discussion about the others work. Include some web resources here on usability.

Segment 5: The Technical Planning (1 of 2)

As multimedia products become more complex and utilize advancing scripting techniques, proper technical planning must be completed early and thoroughly. At the most basic level two types of documents are needed during the Design phase of the project – the Technical Requirements and the Functional Specifications.

Technical Requirements

The Technical Requirements includes some information from the Proposal or the Creative Brief, such a target platform or screen resolution, but it outlines additional requirements as well. Make sure your document includes:

Target Technology

- Platform – manufacturer, machine type, operating system and version, speed of processor, amount of memory, and hard disk space needed.
- Additional peripherals – CD-ROM, DVD-ROM, printer, modem, video card, audio card, network connections
- Internet connection – (if needed) speed of access, browser, plug-ins
- Display – screen resolution, number of colors, even monitor size
- Video – card types, playback software (Windows Media, QuickTime) and versions, RAM
- Audio – 8 or 16 bit sound, mono or stereo, compression
- Desktop Software – is any additional desktop software needed such as Adobe Acrobat Reader or the Microsoft Word PowerPoint Viewer

Back-End Needs

- Database – Will a database be needed? If yes, which format, platform, version, etc.
- Content Management – Does the product require a content management system?
- Internet Connection – Will it be connecting to the Internet? If yes, explain how it should function.
- Search Engine – Will a search engine be needed? If yes, explain what is needed.
- Security – What level of security is needed?
- Personalization – Will the user be able to personalize the experience? If yes, please explain what is needed.
- Transactions – Will any transactions need to be conducted? For example, purchases, request information, submit a registration form.
- Saved Data – Will the system collect data from the user? If yes, please explain what is needed, how it is to be saved, and how it is to be transmitted to the publisher.

Sidebar: Technical Requirements Sample

Functional Specifications (2 of 2)

The Functional Specification begins with an integration of the Functional Storyboard and the Technical Requirements. The Functional Specification documents screen-by-screen the information, interactions, functionality and programming that most occur to make the multimedia product work.

Multimedia firms handle this in two different ways. Some firms do each and every screen, whether it is static or highly interactive. Other firms only document the "functional" screens – those with more advanced programming features. As a project manager, you need to discuss this document with your team and decide which is best suited for the project and your team's needs.

The Functional Specification is often a collaboration by all team members, with the Information Architect typically writing most of the document and the Technical Lead entering the technical portions of the it.

Use the link in the sidebar to view a few pages from a sample Functional Specification Document.

Sidebar: Sample Functional Specification

As multimedia products become more like software, you may want to rely on techniques of software developers such as the Rational Unified Process (http://www.rational.com/products/rup/index.jsp) discussed earlier in the course or the webWAVE Development Process available on Gantthead.com (http://www.gantthead.com/Gantthead/process/processMain/1,1289,2-8435-2,00.html).

Now, go to the Assignments for Day 6. When you have completed the assignment, go the next page.

Day 6 Assignment: Write a Technical Requirements document, include any research and post.

Lesson 4: Week Wrap-Up

Segment 1: Be Watchful, But Don't Micromanage

As stated several times throughout this week's lecture, it is important to keep in close contact with the team throughout the project. But you also must be careful not to micromanage as well!

At a minimum, you should have face-to-face status meetings with the team once a week. And on projects with very tight deadlines, every other day is not unreasonable. Requiring weekly status reports from each individual will benefit you in two ways: 1.) You have a written record of progress 2.) By writing it down an individual feels more committed to the tasks at hand. You should combine those reports into a single Project Status report that is then distributed back to the team during the weekly meeting. As you review the combined report, team members can identify issues, conflicts or areas of opportunity that will help the project run smoothly.

Outside of Status reporting, you should have casual one-to-one contact with each team member at least once a week. Ask about the project, how they feel about meeting the upcoming deadline, do they have all the resources they need? This is an opportunity to uncover any potential issues lurking behind the scenes.

With all this contact, be careful not to micromanage the team. Do not require daily updates or stand over their shoulder and watch them work – especially if they are already late on a deadline. There are project managers who, nervous about upcoming deadlines, ask for updates two, three or even four times a day. This will not help speed along the process and will only hamper the project because the team is resentful and distracted.

Sidebar: Explore Web Resources: Righting a Wreck – The Seven Danger Signals (http://www.zdnet.com/sp/issues/980720/339069.html)

Segment 2: Weekly Summary

You will learn more about monitoring and managing the team during the final week of the course. Before then, you need to move the project through the Develop and Deliver phases.

This week you took a big step, you completed the Design phase. You completed several of the key deliverables for Design including the Creative Brief, the Content Matrix, the Site Architecture and the Technical Requirements. You also reviewed other documentation such as the Functional Storyboard and Functional Specification.

These documents do not represent the total body of work typically completed by the team during the Design Phase; they are a representation of the major deliverables typical to most multimedia projects. Other documents include copy scripts, audio and video scripts, audience profiles, database charts, style guides and much more. You course textbook, Managing Multimedia, has much more detail for the other important Design phase deliverables.

Next week, you will continue managing your project to completion by walking through the Develop and Discover phases. During these phases you will:

- Discover and discuss production techniques for the integration of the assets.
- Respond to a client issue and adjust your timeline, budget and scope accordingly.
- Write a Test Plan for the project.

SIDEBAR: Collaboration is the key to successful multimedia projects. Keep in touch with your team and make sure they are collaborating extensively during the Design Phase.

Proceed to the next page to begin Week 5.