

The Liquid Approach

Easy, Professional Online Project Management
For Fast-Paced Teams





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Everyone has a different idea about what project management means. To some, it's keeping on top of a simple shared to-do list. To others, it's orchestrating a massive set of resources to produce a large-scale deliverable. But we can all agree on one thing: project management is the way business objectives are achieved.

Whether they're formally trained or operating off the cuff, project managers around the globe coordinate the efforts of individual resources to complete tasks and deliverables as part of project plans. Historically, the tools available to project managers have been more similar than different. They've all been based on a set of principles – date-driven schedules, centralized control, and limited transparency.

Recently, the tide has started to turn. At LiquidPlanner, our goal is to lead the way towards what we think is an easier, more people-focused way to manage projects.

This whitepaper is a guide to the LiquidPlanner approach to managing multiple projects. This method can be used by just about anyone – a traditionally-trained Project Manager, an Agile PM, or even an Accidental PM. It's one perspective in a crowded and noisy space, but it's one that is already helping thousands of teams achieve their goals.

Keep reading to learn how to get organized and manage projects more efficiently with LiquidPlanner, no matter who you are.

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Why Old-School Project Management is Becoming Extinct

Remember the days when the Project Manager held the keys to the castle? When you had to wait for the weekly project status meeting to find out whether progress was on track? When getting an accurate copy of the project schedule was harder than cracking the Rubik's cube?

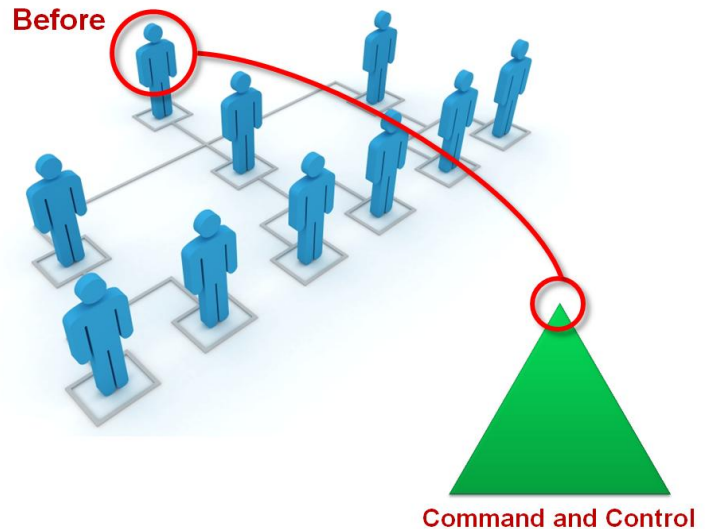
As management tools of all types (both personal and professional) have moved online, the "real time" expectation of always-up-to-date and always-available information has carried over to the project management world.

Today's project management systems are found online and used not just by the guy or gal with "Project Manager" in their title, but by everyone who contributes to the project deliverables.

While some might complain that this is just one more thing to keep up with (piled on top of email, social collaboration systems, and the other tools we use to run our businesses), competitive teams have embraced the **benefits that come with centrally managed project plans and execution:**

- 1) Distributing project administration costs across the team frees up the project manager to focus on strategic and operational challenges.
- 2) Higher efficiency gained from providing "always on" transparency into work assignments, key dates, and team priorities.
- 3) Fewer meetings and less email. Project status updates and communication are centralized and archived for reporting and analysis.
- 4) Better use of resources. Since knowledge workers ARE the assets in many types of business, their productivity equates to revenue. Their time should be allocated and tracked in a way that maximizes the investment in human capital.

LiquidPlanner allows teams to pare down other work management systems (like time tracking, document management, collaboration, and task managers) and move to a single project/portfolio environment that gives them **visibility into the entire scope of work** they have on their plates.



Building a Project Schedule the Best Case/Worst Case Way

Building a project schedule should be easy, right? Just lay out the tasks, assign them, figure out how long they'll take, and boom – you should have a completion date calculated in no time. But would you bet your salary on it?

The truth is that “figuring out how long they will take” is usually, at best, a guess. And adding up a bunch of guesses gets you a pretty risky timeline. One most people are wary of, so they slap a big buffer on the end of the schedule and call it a day. Feeling confident yet? If not, have no fear. There's an easy way to get a **more accurate project schedule!**

In LiquidPlanner, you provide simple “best case” and “worst case” estimates of the effort it will take to complete a task. (i.e., “Write requirements document” will take 4 – 6 hours.) Those two numbers (representing your 80% confidence levels) work out to a little statement of probability. Put in a whole bunch of “ranged estimates” and pretty soon you have a whole statistical picture of when you're likely to complete the set of tasks.

Don't worry – you don't need to have passed college statistics to get a statistically accurate project schedule. Just follow these simple steps and watch your schedule appear before your eyes.

- 1) Add your task and assign it to the person who will do the work.
- 2) Give the task a best case / worst case estimate of the number of hours of work the task requires.
- 3) Prioritize the task along with the other work assigned to that person.
- 4) Hover over the schedule bar to see when you're likely to complete the task.

You're probably thinking, “That's all well and good, but what about my deadlines?” There's a place for deadlines in LiquidPlanner, of course. We call them “promise dates,” and you can enter them for each task or project independent of the schedule dates. That way, you can let the schedule tell you if the deadline is realistic. This works well in a living system, because today your schedule may be perfectly on track. If tomorrow something changes to put your date at risk, the system will let you know.

If your promise date is “in the red,” you can take a number of steps to fix your project schedule:

- 1) Add additional resources or reprioritize work.
- 2) Make sure that the tasks driving the date out are estimated correctly (i.e., has everything been updated?)
- 3) Cut the scope of work.
- 4) Re-set expectations with the stakeholder that the date is not realistic.

For all knowledge-worker project teams, uncertainty is an inherent part of projects. By capturing the uncertainty associated with task effort, a team can have a more accurate sense of the overall project's uncertainty than most traditional methods provide (i.e., project buffers). Furthermore, by exposing that uncertainty early on in the process, steps may be taken to **mitigate risks before they impact the project schedule.**



Stop Thinking So Hard: Multi-Project Scheduling is Easy



Let's start with a little pop quiz: What do all of the projects you're managing have in common?

Answer (for most teams): The people doing the work!

Multi-project scheduling is where the rubber hits the road in project management. In most systems, you have a "project file" for each distinct project you're working on. Those systems work by having you create "deterministic" schedules (i.e., YOU tell the system the start/end dates and/or durations of each task.) This seems great at first; because you can make the schedule "look" however you want (very comforting when you're just trying to get a plan on paper).

But beware: those deterministic project schedules have some hidden pitfalls. First, they don't generally talk to each other. In other words, when calculating Project A, the project system doesn't take into account the work that team members are doing on Project B. (Or, if it does, it's extremely complicated to manage.)

The result? Highly unrealistic and uninformed schedules. Second, you have to manually update each schedule when something on a project with a shared resource slips, changes, or are added. Who can manage that web of complexity across multiple files?

In LiquidPlanner, all projects are shown in a single view, and they're always scheduled taking shared resources into account. Scheduling those overlapping sets of work sounds tricky, right? Actually, it's simple. To get the best schedule, have teams focus on what's important. (As it turns out, that how most of us think and act anyway.) In practice, we call it **priority-based project scheduling**.

Here's how it works in a nutshell: Projects that are the most important to the organization should be done first, because they either provide the most direct value in terms of revenue, or they are strategic in nature (i.e., pressingly urgent to a key customer.)

To get a multi-project schedule in minutes, just put your projects in priority order. All it requires is that the tasks in the project are assigned and estimated to the people who will do the work. Then LiquidPlanner calculates your expected start/end dates for you. In other words, the scheduling engine calculates when you'll be able to complete projects (hint: less work for you!)

Most teams don't work on a single project at a time; individuals and managers are **juggling multiple concurrent projects or major subprojects** on a daily basis. It follows that delays, overruns, or other unanticipated changes to a single project's schedule impact the schedules of other projects where there is resource overlap.

When multiple concurrent projects are in play, use more granular ordering (of individual tasks) to reflect each person's priorities. This is basically like making a to-do list for each of your team members. (What's easier than that?) The cool thing is that because all the projects are tied together, you can see how they impact each other. For example, if Joe has to work on an urgent Project B task, it will push out Project A. And you can see this **instantly and automatically!**

As long as people keep their progress updated on a relatively frequent basis, you get meaningful insights into the resource pool's capacity in real-time. And by prioritizing projects and deriving the project schedule from the priority order, teams can achieve the highest return on their investment of time.

Distributed Project Management: Three Steps to a Living Project Plan

Project plans have long been the domain of the project manager. Usually they're written at the beginning of the project lifecycle, then filed neatly away and updated once or twice if time permits. This "map" of the project isn't very useful tucked away in a drawer. And what team member is going to bother opening a Microsoft Project file every day?

Today, your project plan doesn't need to be just an artifact of a last month's planning session – it can be the compass that guides each day's work. In LiquidPlanner, if the plan changes every day, that's a good thing: it means it's keeping up with reality. Here are three steps to follow to get a living project plan that can guide your team through the ups and downs of every project:

1) Share the load

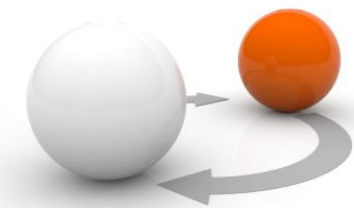
If updating the schedule is solely the project manager's responsibility, it falls quickly out of date because of daily firefighting, coordination, and meetings. Only when a customer or exec asks for an updated plan does the project manager scramble to mark items 100% complete and "green up" the project schedule. (Sound familiar?)

We believe that when it comes to project administration, many hands make light work (and a more accurate schedule). If every team member takes five minutes a day to update their progress, re-estimate remaining work, and add necessary comments or documents, the schedule stays current and the project manager is freed up from a huge administrative burden. When self-updates become a habit, everyone benefits.

2) Change the agenda

Congratulations! If you followed step #1, you've just saved yourself at least one hour of project status meetings each week and probably some informal meetings, too. Instead of going around the room and finding out what's done and what's not, team meetings can now be spent addressing roadblocks, evaluating new work requests, analyzing workloads, and other critical business. This keeps projects flowing and communication strong, allowing leaders to make the best decisions possible.

3) Centralize communication and get out of email



Email overload comes with some pretty costly side effects: wasted time, difficulty locating information, and "lost" business intelligence. But what if you could move conversations about projects out of your email inbox and into your project management system? That's exactly what LiquidPlanner teams do, and they operate more efficiently because of it.

When you need to remember something about a task or project, ATTACH it to that item in the plan. When you need to communicate about a task or project, comment ON that item in the plan. That creates a public record and information archive for each piece of work, so no matter what happens to it (whether it's marked done, escalated, or postponed), the critical collateral stays with it. And when you start work on a task, you don't have to search through old email files to find the information you need to do the job.

An added bonus: your team can see what you're working on (and vice versa), creating a better implicit understanding of how everyone is contributing to the team. It's just like on Facebook – you don't have to comment on each person's status update, but when you see them, you have a better sense of what they've been up to. You might even find out that you share a common interest or challenge, and you can both learn from that. Email has its place, but centralizing project communication alongside with the plan itself can make your project team even better.

A Day in the Life of Your Project: For the Team Member

Since we've established why it's so important for team members to participate in the ongoing project planning process, let's start with them. If you're a team member, what kind of time commitment should you expect? Here's a daily action list to keep your part of the plan up to date.



1) Find the work assigned to you

You can find the work assigned to you in the “my tasks” view, or go to the “projects” page and set the filter to “me.” That will pare the list down just to the tasks assigned to you. In both places, the work will appear in priority order.

2) Confirm priority order

Does the order of the work look basically right to you? In your job, you may jump around a bit on the tasks. That's ok as long as you're keeping progress up to date (more on that next). But if the list you're seeing doesn't map to what you think you're supposed to be working on, take a minute to sync up with your project manager. (Or fix it yourself if that's the way your team operates.)

3) Update progress

In LiquidPlanner, all you have to do to update progress is fill in the number of hours you spent working on the task at hand. If your team is tracking time, you might also need to assign an activity code to it. Using the handy task timer will let you calculate to the minute how long things take. (Just remember to hit stop when you're done!) Do this once a day on all the tasks you work on and you'll be golden.

4) Check estimates

When you update your progress, the “remaining work” estimates will go down by a corresponding amount. Note that those estimates are best case / worst case scenarios. It's a good thing to double-check that remaining work to see if it's still on track. If not, re-estimate it and move on. You can quickly scan the tasks at the top of your priority list (even the ones you didn't work on today) to make sure they're about right. This will make your project manager very happy.

5) Make comments and attach documents, links, or detailed descriptions

While you're in each task marking progress and updating estimates, go ahead and add some color to your update. It can be informal like, “Good progress being made,” or something more detailed, like “Sent round 1 revisions back to the designer.” This keeps a record on the task of what's going on each day. You can send your comments to another team member if you want to keep them in the loop. To keep an even more detailed record, add additional collateral on the Collaborate view.

That's it! Now you've made your updates and can get back to tackling the tasks on your list. Estimated time elapsed: 4–7 minutes.

A Day in the Life of Your Project: For the Project Manager

All good project managers develop their own techniques for keeping all the balls in the air. They're part science, part art – and different for every team and situation. The following list can serve as a starting point for making those techniques work with the LiquidPlanner approach. *(For the sake of brevity, we're assuming that you already know the basics of breaking down the work, scheduling based on priority order, and other project management fundamentals.)*



1) People first

In priority-based scheduling, it all comes down to the people on the team and what they're supposed to be working on. You probably have an intuitive sense of that already. Now's the time to filter to each individual that you're managing (one-by-one) and make sure that their priority list is in order. Now when they log in to the system and check their task list, you'll be on the same page. You can also check to make sure the progress you're expecting is being made (compare "Total Done" to "Remaining Work" for the full picture.)

2) Make your own updates

You likely have tasks in the system like everyone else. Be a role model for the rest of the team and make your project updates (progress, estimates, and comments) on a daily basis. Respond to questions and remarks to keep the conversation flowing.

3) Tackle changes

Most teams are dealing with a constantly changing landscape: new project requests, change orders, issues, "hot" items, interruptions... the list goes on. It can be helpful to have a "holding bin" for those items and a clearly-defined process for addressing them. Maybe it's a weekly team meeting or simply your responsibility to do on a daily basis. Either way, take time to correctly assign, estimate, and prioritize the items. You'll then be able to see how they impact the portfolio of projects you're managing.

4) Troubleshoot dates and risks

Now is the time to scan through each project's schedule. If you have promise dates that are in the red (or yellow), it's time to take action. Find out: Has progress been updated? Are remaining work estimates correct? Is the project (or critical tasks) prioritized correctly? Can you bring more resources into the mix? Can you cut scope? Is the promise date realistic or does it need to be moved out? Based on the answers, you can start to communicate your mitigation plan to the people it affects.

5) Look for opportunities

If you've got some spare cycles, you can spend time on "forensic" project management. There are always ways to optimize the work of the team. For example, clean up and delete or archive old tasks/ projects that are no longer relevant. Look through the analysis reports to see if resources are load-balanced and fully scheduled for the next wave of work. Build in a new business process into the structure to smooth out a rough edge in your workflow. This kind of maintenance (even just a few minutes a week) can keep your workspace in a healthy state for the long run.

Now that you've put in your time (the exact amount varies based on the complexity of your projects and the size of your team), you can get back to work, too. Only this time you should have a clean roadmap in front of you.

About LiquidPlanner

LiquidPlanner was co-founded by Charles Seybold and Jason Carlson in 2006. Experienced technologists, they helped build Expedia.com, one of the world's largest and most recognizable online businesses. Having seen countless projects flounder or fall flat in the absence of effective project planning tools, they took it upon themselves to fill the void. The company is based in Bellevue, Washington and serves over 500 organizations.

About the Author



Liz Pearce is the Vice President of Sales and Marketing at LiquidPlanner and has been part of the company since its inception. Over the past four years, Liz has helped hundreds of project teams improve their organization, efficiency, and collaboration with LiquidPlanner.

Prior to LiquidPlanner, she managed projects at Sony Computer Entertainment America, Google, and Amazon.com. Liz holds a B.A. in Political Communications and an M.A. in Telecommunications from The George Washington University.

Contact LiquidPlanner

To learn more about the Liquid Approach or to arrange for a custom training or sales demonstration, contact the LiquidPlanner team at info@liquidplanner.com, or call 1-800-971-1601 to speak with a representative.