**NNIPCamp Denver**

Session 4: Thursday 10/23/2014, 4:00pm-5:00pm

Location: Sage

Session Title: Project Management Deathmatch

Organizer: Spike

Primary Notetaker: Rob Pitingolo

Participants: Clausen, McKieren, Smith, Lee, Raleigh, Keithley, Clark, Simmons, Martinez, Hendey, King, Gradeck, Gaul, Killeen, Capperis, Wheeling [arrived late], Barry [arrived late], Carnathan [arrived late], Farnam [arrived late]

[Session begins]

[Everyone waiting on Spike to arrive]

Clausen: Let’s say what project management tool you use, assuming you use one. I am a fan of Excel Spreadsheets.

Gradeck: In the adoption of tools, no matter how great something is, people won’t want to change.

[Spike arrives, Wheeling arrives]

Spike: Let’s start with questions.

Raleigh: Is anyone successfully using these tools?

Spike: OK let’s not start with that.

Gradeck: What’s the context, how many projects, nature of projects.

Spike: Organizations are different.

Raleigh: Is anything out of the box and useful to them?

[Barry arrives]

Smith: How much time are people spending on various projects.

Spike: How big is your team?

Smith: 6 people.

Lee: We have 3 or 4 tools. Developers prefer one, someone else prefers another.

[Carnathan arrives]

McKieran: Need to manage other partners with different tools and capacity.

Hendey: I want to know what works.

Spike: Don’t give any background, just say what you use. Then a show of hands. *(note: first number is number of people using this tool, second number is number who tried it and abandoned it)*

Hendey: Excel (13/2)

Wheeling: Google spreadsheets (8/ )

Keithley: [OpenAir](http://www.openair.com/) (1/ )

[no hands]

Spike: We’ll come back to these

Spike: [Trello](https://trello.com/) (3/2)

Carnathan: [OpenAtrium](http://openatrium.com/) (1/1)

Gradeck: List of tasks in an email (all)

Martinez: [Asana](https://asana.com/) (3/3)

Spike: [Base Camp](https://basecamp.com/) (5/7)

Raleigh: Google Tasks (1/ )

Killeen: Outlook Calendar (1/all)

Capperis: [Smart Sheets](http://www.smartsheet.com/s/coordinate-anything-5) (2/1)

Raleigh: [Pivotal](http://www.pivotaltracker.com/) (1/ )

Spike: There’s a lot of things to use. Some new, some ancient. There’s churn, some people don’t like things they try. In your organizations, how many people are in an organization with actual managers instead of generalists?

[5 hands]

Spike: How many people have had formal training around project management? Have you raised it as a thing in your organization?

Spike: With the current system, lay out some of your experience and frustration. If you found your system works well, give people an idea of what that looks like.

Barry: As a manager it’s nice to see what’s in the que, what’s in motion, and who’s assigned to what. Problem with a lot of current tools is that they do detail oriented tasks but don’t give it in a meaningful iew for a team meeting.

Spike: Do you use that for invoicing?

Barry: We don’t invoice but [Freedcamp](https://freedcamp.com/) could be used to do that.

Keithley: We use Open Air. Can adapt how it reports information for our needs.

[Farnam arrives]

Spike: So it tracks time and tasks?

Raleigh: Invoicing?

Keithley: Yeah. Project management is something we have to do as part of our job. Our director of operations is in charge and does a lot of the maintenance of it. Someone else started using it, he took it on and it mostly works. It’s a lot for a single person to manage.

Spike: Is it cloud? Desktop?

Keithley: Don’t know, but there is tech support. One of our people went to an Open Air conference in San Jose.

Spike: Any other success stories?

Capperis: Furman uses [Sona](http://www.sonallc.com/program--project-management.html). We have full-time staffers, research fellows, student research assistant. Everyone is responsible for overseeing projects on their team. Very helpful in tracking time of research assistants. Supervisor automatically receives updates on the RAs hours. Coupling it with an excel based system. We view it as task management and not project management. We are implementing a list of key things to know about a project. It can be cumbersome around expectations of details. I would advise cutting down on the detail and focusing on larger chunks. We often use memos for communicating minute details.

Spike: How did you get here.

Capperis: We started small and did a wider search. Started with 10 systems, narrowed it down to 3 that we tested. Presented those options to the admin team and came to a consensus about what to use.

Hendey: What were the losing options?

Capperis: Teambox and Trello.

Spike: Anyone else?

Raleigh: We tried a bunch and had a hard time finding something to stick. We’ve had fluctuation of staff. We grew, shrunk, shrunk some more. Now we operate more like a matrix system. Some managers juggle everything try to avoid conflicts. We find the less detail the better. What time did you start working? What time did you end? What project code? What task were you doing? It’s all in excel. Turn it in every week, aggregate, run script, then invoice. Each manager does the invoice request and client deliverables/relationships. We meet to discuss red flags. We fill in details at the beginning of the project - people, budgets money. Formulas populate to tell us how much budget has been spent. Sometimes the system falls apart. Sometimes invoices get missed. THat’s why I'm exploring this again.

Clausen: Recently I started with Harvest.

Lee: I use [Toggl](https://www.toggl.com/). It’s got a good reporting, dashboard system. Let people see how their spent their time.

Clausen: Harvest has some decent dashboards, plus apps, so it’s convenient.

McKieran: Don’t you have to clock in an out.

[Clausen showing McKieran [Harvest](https://www.getharvest.com/) on a laptop, side conversations breaking out]

Spike: Anyone else?

Farnam: I use Harvest for my consulting service. Good for invoice. We use Red Mine for feature tracking and development and project management. Similar concept to Weave, lots of features built in.

Spike: Anyone else?

Barry: The most fun method was a big wall with index cards taped on it. Projects on notes, move upward through projects. Could more back down if needed. Had a daily huddle to see where things are. Not useful for time tracking or invoice but people were on the same page. We don’t have the right office right now for it but I’d abandon Trello for that.

Hendey: I have a lot of blank walls, want to trade?

[laughter]

Barry: I think Trello is kind of a kanban solution. The beauty of the wall is that you can’t overload it.

Gaul: We used something similar to that, but not on a wall.

Gradeck: What kind of people based products?

Capperis: I check in with my supervisees every day. I always have time for everyone on my calendar every week.

Keithley: We do a weekly status update. And then Aaron reviews what everyone wrote, then a team meeting where he can address any questions or red flags.

Raleigh: We do a rolling Google Doc. Project managers update the projects. Every Monday we meet for an hour but I don’t know if that’s not a good use of time. We’re thinking the 5 minute standup thing. “Meeting mode” sucks time.

Keithley: Our team meetings used to be a huge waste of time. It was drag forever and people would fall asleep. We have a red/green/yellow thing. Budget, workload, schedule. If anything is marked red it gets Aaron’s attention. If the project is chugging along there is no need to have an in depth analysis.

Lee: Feels like we’re building silos that are hard to cross.

Raleigh: When you get big and have stuff going on, you lose some of the innovating culture of learning together or from each other. We’ve gone back to presenting on an amazing thing we just finished. Should set aside time for celebration.

Simmons: We do staff meeting presentations as well. They were supposed to replace something but now it’s on top, so gotta fix that.

Clark: We have two different offices. People are in different locations. Took 3 people to get into the same location.

Hendey: People are always traveling for work. Or senior staff aren’t around.

Spike: Bring people in on a hangout.

[People commenting on the solar eclipse]

King: We’ve made a big investment in using Salesforce. Do any of these tools connect to Salesforce?

Capperis: It’s too expensive. We only use it for high level tracking. We use reports for people who don’t need to input into it.

Realight: Anyone else use Salesforce?

Spike: Yes but not for project management. Our accountants are old school. We finally got a consultant to see if we can get away from desktops. Smart Sheet is cloud based and lets you do a lot but it doesn’t really sync. We’re getting better at project management but the timecards are only processed twice a month.

Hendey: We have a very old system of accounting. It runs on an Alpha. I can get hours but can’t download it or automatically pop into a budget. Mainly we use excel and don’t have great info for 2 weeks at a time. It’s not always an issue but toward the end it’s a problem. If there are other tools I could use on top I’d like that.

Clausen: My accounting people used to be so old school they would not allow any automated entry. Some tools would plug into their system but I wasn’t allowed.

Raleigh: I can’t get useful financial info. Accounting sent me PDF documents. I hand-entered them. I don’t have a solution for that.

Gradeck: How do you get everyone to adopt these tools?

Smith: We’re a university so it’s set up differently than others.

Hendey: Lots of decentralized teams kills the incentives to learn these things.

Capperis: We know that some people in the organization will not touch it. Some people are too important to take the time to learn it.

Raleigh: So you need someone higher than interns and lower than CEO to make this happen. OK.

Farnam: A friend of my son codes on [Timeful](http://www.timeful.com/). Sharpen your use of time. Get rid of bad habits. Sharpen good habits. Read up on it, it’s interesting.

Raleigh: One reason people use these tools is that you have to. My team loves data so it’s easy to sell these kinds of things. Early on it’s not easy. People fear it’s about catching them screwing up.

Spike: I’m both encouraged and frustrated. What I want to leave with is. What do you want to learn or have access to?

McKieran: There’s not one solution, depends on types of teams and size of teams. I want a matrix that shows keys for various types of teams.

Clark: A matrix of all the tools and different ways that it does or doesn’t fit in a category.

McKieran: A pros and cons list.

Gradeck: That would be helpful. Also the learning curve and how to start.

McKieran: Pricing, obviously. Some are free. Some are costly.

Clausen: Some are free for 3 people, insanely costly for 4.

Spike: It’s really about how you choose to implement. Some examples are processes, not tools. Tools are great, but processes are necessary.

Barry: Understanding the project is necessary before you select a tool.

Spike: So those are all achievable, doable things that makes sense. A key problem with this network is that how do we move this forward? There’s a broad Google group - too broad for this. What’s the best way to sustain this aspect?

[no responses]

Spike: We often get ideas here that don’t translate into action. That’s a failure of the approach.

Hendey: A different Google group for select management talk?

McKieran: I feel better about the reach of that. I don’t want to broadcast stuff to big groups.

Carnathan: Roll this into business planning. How many people are getting enough data requests to use a ticket system.

[Gradeck pulls a post it note]

Gradeck: Here’s my ticket system.

Raleigh: We manage in an excel document.

McKieran: We can’t have shared email accounts.

Clausen: A ticketing system I like is called [Zendesk](https://www.zendesk.com). It’s cool because Harvest integrates into Zendesk. Stuff goes into Zendesk, assign to someone on the team, assign a status, each step of the way. Internal comments or public comments. It’s pretty magical but expensive.

Spike: That’s getting into a whole nother thing. Let’s do a poll. Has it been too long since we discussed community data requests?

Hendey: Kathy did a survey on this. [Hendey laughs]

Spike: It’s a good catalyst to revisit this.

Hendey: Let’s do a session or a webinar.

Clausen: I think Zendesk isn’t something I’d use on a big project but it’s good for Helpdesk.

Raleigh: I’d love to do that.

Hendey: Are we a yes on a management Google group?

[some people leaving, getting restless]

Spike: Yes, every site should choose the people on it.

McKieren: Create rules for it.

Hendey: It’s another unwieldy thing for us to maintain.

Clausen: Junior staff won’t care.

Spike: OK, so a few things will be sent out. We’re done.

[End of session]