

- Shel Perkins  
*Management advisor to  
creative services firms*

# **Project management basics for designers**

## *Submitting questions to the speaker*

- Submit a question at any time by using the “ask a question” section on the lower left-hand side of your console
- Questions about content will be answered during a 10-minute Q&A session at the end of the webcast

# Housekeeping

*Technical difficulties?*

- Click the “need help?” button
- Use the “ask a question” interface

**Housekeeping**

**Advance planning**

*For you: research client needs*

- Gather as much advance information about the project as you can  
*(client's RFP document,  
your own questionnaire)*

**Advance planning**

*For you: draft a project plan and budget*

- Use an internal planning worksheet to calculate a “suggested retail” price, then adjust totals as needed
- It should accurately reflect your process and sequence of events
- The purpose is to clarify your assumptions about the scope of work, overall timeframe, size of team, number of hours, outside services, materials and markups
- The worksheet might look like this...

**Advance planning**

## Fees

## Expenses

Name	Steve	Mary	John	Net	Markup	Gross
Rate	\$100	\$100	\$100			

**Advance planning**

## Process

## Fees

## Expenses

		Name	Steve	Mary	John			
		Rate	\$100	\$100	\$100	Net	Markup	Gross
<b>1</b>	Step one Step two Step three Milestone							
<b>2</b>	Step one Step two Step three Milestone							

# Advance planning

## Process

## Fees

## Expenses

		Name	Steve	Mary	John					
		Rate	\$100	\$100	\$100	Net	Markup	Gross		
<b>1</b>	Step one	Hours	8	8	8	Describe	\$100	20%	\$120	
	Step two		8	8	8		\$100	20%	\$120	
	Step three		8	8	8		\$100	20%	\$120	
	Milestone		8	8	8		\$100	20%	\$120	
	Hours	96	32	32	32	.	.	.	.	
	Fees	\$9,600	\$3,200	\$3,200	\$3,200	.	.	.	.	
	Expenses	\$480	.	.	.	.	.	.	\$480	
	<b>2</b>	Step one	Hours	8	8	8	Describe	\$100	20%	\$120
		Step two		8	8	8		\$100	20%	\$120
Step three			8	8	8		\$100	20%	\$120	
Milestone			8	8	8		\$100	20%	\$120	
Hours		96	32	32	32	.	.	.	.	
Fees		\$9,600	\$3,200	\$3,200	\$3,200	.	.	.	.	
Expenses		\$480	.	.	.	.	.	.	\$480	

# Advance planning

## Process

## Fees

## Expenses

		Name	Steve	Mary	John					
		Rate	\$100	\$100	\$100	Net	Markup	Gross		
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	Hours	96	32	32	32	.	.	.	.	
	Fees	\$9,600	\$3,200	\$3,200	\$3,200	.	.	.	.	
	Expenses	\$480	.	.	.	.	.	.	\$480	
	<b>2</b>	Step one	Hours	8	8	8	Describe	\$100	20%	\$120
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Step three			8	8	8		\$100	20%	\$120	
Milestone			8	8	8		\$100	20%	\$120	
Hours		96	32	32	32	.	.	.	.	
Fees		\$9,600	\$3,200	\$3,200	\$3,200	.	.	.	.	
Expenses		\$480	.	.	.	.	.	.	\$480	
<b>Total</b>		Hours	192	64	64	64	.	.	.	.
		Fees	\$19,200	\$6,400	\$6,400	\$6,400	.	.	.	.
	Expenses	\$960	.	.	.	.	.	.	\$960	

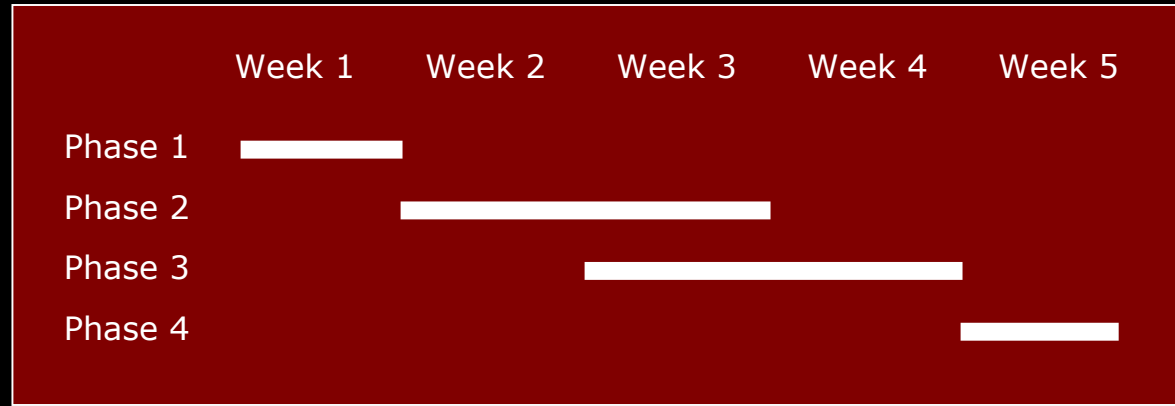
# Advance planning

*Now draft a project schedule*

- Plan the total amount of workdays required to complete this project
- Include enough time for client approvals
- You'll be multi-tasking, so factor in your workload from other clients
- Try to avoid committing to specific dates, just in case there are unforeseen delays
- It's smarter to show blocks of time in the form of a Gantt chart...

**Advance planning**

*Now draft a project schedule*



**Advance planning**

*Final check: be sure that you understand*

- Context  
*the overall situation that the client is in*
- Scope of work  
*the immediate needs that must be addressed by this project*
- Success criteria  
*the specific business objectives that must be accomplished by the end of this project*

**Advance planning**

- Now that you've done your own internal planning, prepare a well-written proposal document to give to the client
- A good proposal is half the battle — it prevents confusion and makes the entire project easier to manage
- It sets realistic client expectations and helps to prevent legal disputes

**Internal vs. external**

- Begin with a clear statement of the scope of work and the project objectives
- Then include the following...

# **The written proposal**

- A detailed description of the process you're recommending  
*broken up into phases and steps*
- For each phase  
*spell out what's included and what's not, describe your steps and deliverables and the client approval milestones, state the number of revisions or refinements that are included, the format for delivery, the number of workdays or weeks needed, include subtotals of fees and expenses*

## **The written proposal**

- Along the way  
*clarify how the client is integrated into the process — what's expected of them, when meetings and feedback will be needed*
- Recap the total fees and expenses  
*at the end of the process description and show any applicable taxes*
- Recap the work schedule  
*show the total amount of time needed, preferably as a Gantt chart*

## **The written proposal**

- Billing plan  
*include a simple list of when invoices will be issued and what the amounts will be*
- Terms and conditions  
*appropriate to the nature of the work being performed (at the very least, these will address ownership/license issues, payment issues and general legal issues)*

## **The written proposal**

# **The project manager role**

*Team leader*

Client      Strategist      Designer 1      Implementer 1      Vendor 1  
   Designer 2      Implementer 2      Vendor 2  
   Designer 3

The diagram illustrates the roles within a project team. At the top, the text 'Team leader' is written in orange italics. Below it, a large orange curly bracket spans across five columns of roles: Client, Strategist, Designer 1, Implementer 1, and Vendor 1. The roles 'Designer 2' and 'Vendor 2' are positioned below 'Designer 1' and 'Implementer 1' respectively. 'Designer 3' is positioned below 'Designer 2'. A second large orange curly bracket is positioned below the Designer and Implementer roles, with the text 'Project manager' written in orange italics below it.

*Project manager*

**The project manager role**

- This key person must have a good understanding of the creative and production processes involved...
- But the role is not that of a designer
- The exact job title may vary, based on the nature of the studio
- Here are two sample job descriptions...

## **The project manager role**

- The Project Manager helps manage projects from inception through launch. Project Managers are the primary client contact through the production process.

Responsibilities include coordinating design staff, representing the client internally, managing and developing budgets and schedules, overseeing asset management, and daily resource tracking.

The Project Manager coordinates across departments to ensure successful completion of projects, manages projects to estimate, helps to manage client expectations, and facilitates the flow of client communication as it relates to production and the internal project team. The Project Manager must clearly represent the team's consensus in all client communications.

Additional tasks include reviewing drafts of deliverables with the team, scheduling deliverable reviews, and ensuring that finished work is received by the client.

# Project manager

- The Producer manages the design and production aspects of Web development projects.

Responsibilities include tracking resources and managing assets, coordinating across internal departments (Technology, Design, Production, and Quality Assurance) to ensure successful delivery of projects, and coordinating information and asset flow between internal teams and the client.

Required experience and skills include a minimum of one year as a Producer in a Web production environment, familiarity with the Mac and Windows operating systems, a working knowledge of Microsoft Office, strong time management skills, and proven ability to accurately balance the skill sets and workloads of design and production teams.

The Producer must have excellent communication and teamwork skills and be a motivated self-starter with a positive attitude who requires minimal supervision.

# Producer

# Project tracking

- Project folder / binder with a checklist of records that it should contain
- Contact information for full design and client team: name, role, phone, e-mail, delivery address
- Final internal planning worksheet
- Signed proposal / client contract

## **Manual system basics**

- Dates and version numbers on all documents and files
- Naming convention and backup procedure for digital files
- Daily timesheets
- Progress reports to compare budget to actual

## **Manual system basics**

- Purchase orders and vendor expenses
- Signed change orders
- Signed proofs
- Project billings and payments

**Manual system basics**

- Weed the folder / binder of duplicate or out-of-date information  
*separate the "reference" information that must be accessed often (proposal, budget, schedule) from any "archive" information (back copies, earlier versions)*
- Use a tickler system for active documents that require a specific future action

## **Manual system basics**

- Scope creep  
*moving goal post — people will want to add things*
- Poor organization of resources  
*communication problems and misunderstandings*
- Lack of role definition for team members  
*who does what and who's responsible for what*
- Dependency on one person  
*make sure there's always cover in case of emergency or illness*

## Common problems

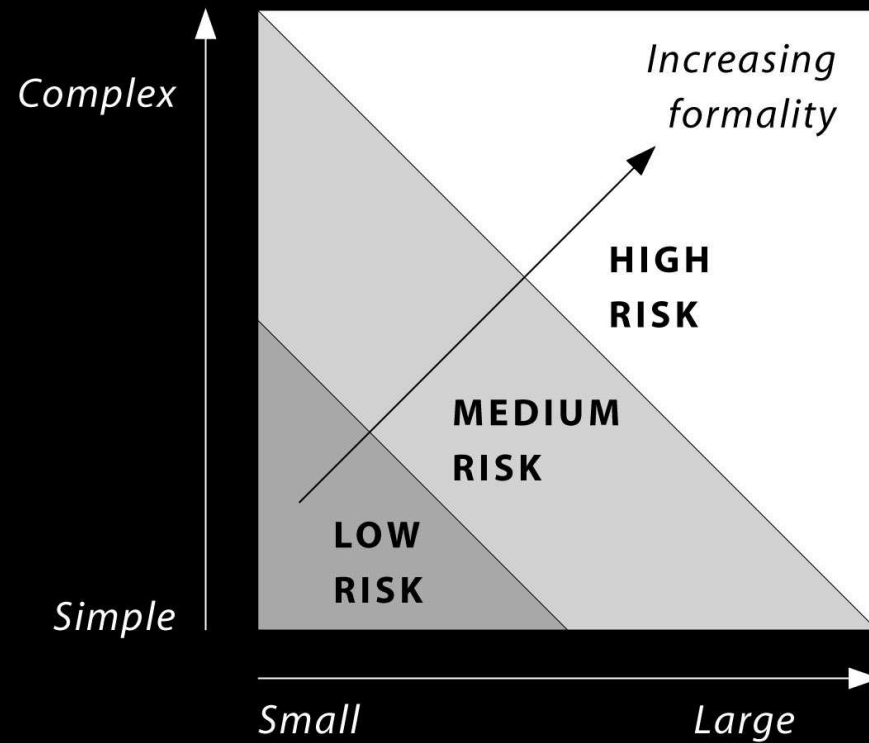
- Unclear objectives  
*have agreed-upon objectives and  
agreement on any material changes*
- Incomplete plan  
*comprehensive planning  
prevents arguments*
- Project funding  
*who holds the purse strings  
and who decides any trade-offs*

## **Common problems**

- Proactive updates, verbal and written
- Always be accessible
- Respond promptly to inquiries
- Earn confidence and respect, so that the initial project turns into an ongoing relationship

**Client communication**

**Large project issues**



**Large project issues**

**PROJECT BURN RATE**

Client: ABC Company

Job Number: 15025

Start Date: February 8

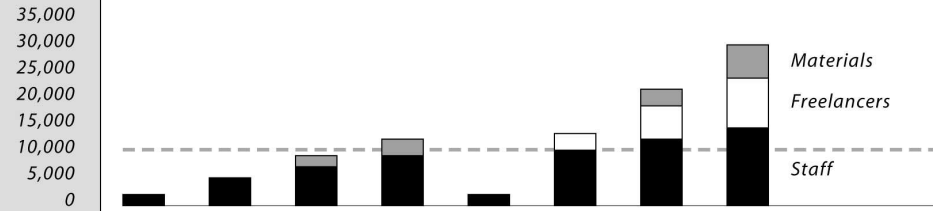
Total Budget: \$100,000

Job Name: Expo Materials

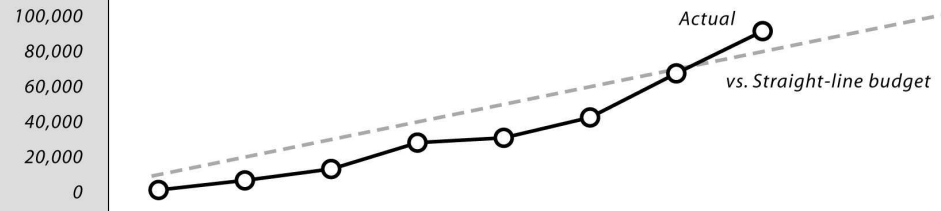
Due Date: April 19

Total Schedule: 10 Weeks

WEEKLY ACTUAL	1	2	3	4	5	6	7	8	9	10
Staff	2,000	5,000	7,000	9,000	2,000	10,000	12,000	14,000		
Freelancers	0	0	0	0	0	3,000	6,000	9,000	Time remaining	
Materials	0	0	2,000	3,000	0	0	3,000	6,000		
<b>Total</b>	<b>2,000</b>	<b>5,000</b>	<b>9,000</b>	<b>12,000</b>	<b>2,000</b>	<b>13,000</b>	<b>21,000</b>	<b>29,000</b>		



CUMULATIVE ACTUAL	1	2	3	4	5	6	7	8	9	10
Staff	2,000	7,000	14,000	23,000	25,000	35,000	47,000	61,000		
Freelancers	0	0	0	0	0	3,000	9,000	18,000	Time remaining	
Materials	0	0	2,000	5,000	5,000	5,000	8,000	14,000		
<b>Total</b>	<b>2,000</b>	<b>7,000</b>	<b>16,000</b>	<b>28,000</b>	<b>30,000</b>	<b>43,000</b>	<b>64,000</b>	<b>93,000</b>		



**Burn rate**

**Project tracking software**

*Smaller systems without accounting*

- Creative Management  
*www.creativemanagement.info*
- OmniPilot Agency  
*www.omnipilotagency.com*
- Studio Manager  
*www.studio-manager.com*

**Project tracking software**

## *Smaller systems without accounting*

- Studiometry  
*www.oranged.net*
- TimeFox  
*www.functionfox.com*
- Traffic  
*www.sohnar.com*

# **Project tracking software**

*Larger systems with full accounting*

- Clients & Profits  
*www.clientsandprofits.com*
- Creative Manager Pro  
*www.creativemanagerpro.com*
- JobOrder  
*www.joborder.com*
- Rebus  
*www.rebus-software.com*

**Project tracking software**

**For your reference**

- *Talent Is Not Enough:  
Business Secrets For Designers*  
by Shel Perkins  
co-published by AIGA Design Press  
and Peachpit/New Riders

**For your reference**

- Shel Perkins & Associates  
P.O. Box 410356  
San Francisco  
California 94141-0356  
415.826.4583 voice  
415.826.5487 fax  
[contact@shelperkins.com](mailto:contact@shelperkins.com)

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# Discussion

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**Thank you!**

