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Project Management: Keeping it Simple
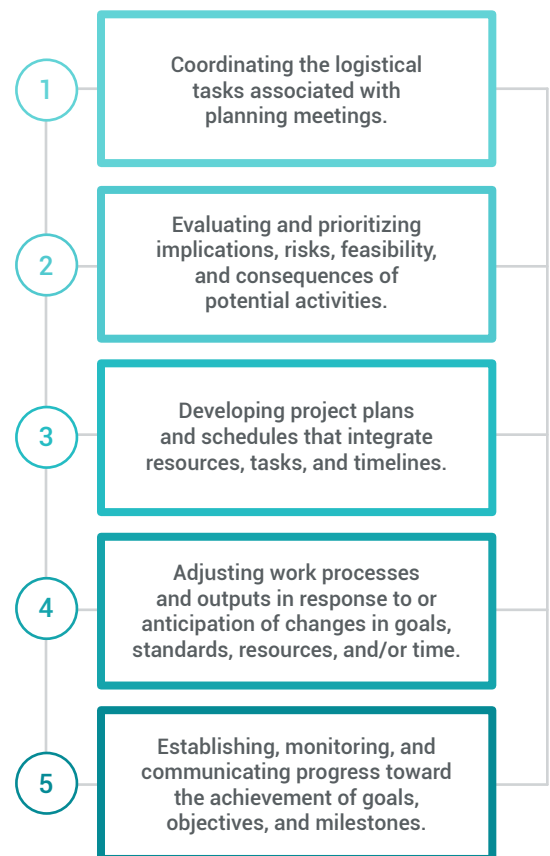
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Project Management: Keeping it Simple

Project management is an essential skill for content developers. In the new Talent Development Capability Model (www.tdcapability.org), project management is one of the "foundational or enabling abilities all working professionals should possess to be effective in the business world." The ATD Capability model identifies five project management skills:

As a consultant, I've worked with hundreds of different companies who use a seemingly endless variety of project management applications. Several of these applications work well, and I've enjoyed using them. However, it's hard enough to juggle multiple projects, tasks, timelines, and schedules. I don't have enough hands (or brain space!) to juggle several different applications, too. Since I typically use MadCap Flare and MadCap Central for content authoring and content management, my goal is to keep it simple and use their built-in project management features as much as possible.

1. Coordinating the logistical tasks associated with planning meetings.

2. Evaluating and prioritizing implications, risks, feasibility, and consequences of potential activities.

3. Developing project plans and schedules that integrate resources, tasks, and timelines.

4. Adjusting work processes and outputs in response to or anticipation of changes in goals, standards, resources, and/or time.

5. Establishing, monitoring, and communicating progress toward the achievement of goals, objectives, and milestones.

Coordinating and Planning Meetings

Our goal (and ATD's mission) is to "empower professionals to develop talent in the workplace." That requires us to collaborate with a wide range of coworkers, from other content developers to subject matter experts (SMEs), champions, sponsors, and learners. Slack works well for quick questions or chat meetings with coworkers and SMEs. Most of my clients use video conferencing apps such as GoToMeeting and Zoom for weekly meetings with the development team and management.
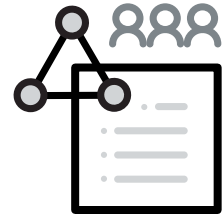
MadCap Central provides several options for scheduling and tracking meetings. As part of a team, I use the task calendar to schedule meetings. It helps me stay up to date on everyone's progress, and it helps everyone on the team feel more connected. I keep my task calendar on my dashboard, so I don't have to switch between multiple applications and risk missing anything.

Evaluating and Prioritizing Activities

Project management is based on prioritizing based on risks, rewards, needs, and resources. As Stephen Covey recommended, we must identify and focus on what's important rather than what's urgent. Content accuracy and consistency are usually my most important requirements.
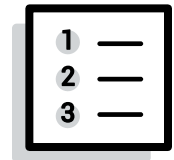
I use MadCap Flare to single source between projects. Linking and reusing content creates a "single source of truth" that I can update once for all uses across all projects. For content outside Flare, such as Word documents, I use a knowledge map to locate and validate the content. I can even import the content into MadCap Flare, reuse it in multiple projects, and still update it outside Flare. This approach allows me to fully leverage a company's knowledge assets. It drastically reduces risks, since I can reuse existing approved content rather than spend time developing new content.

Developing Project Plans and Schedules

Project plans and schedules keep projects on track and on budget. There are several excellent project planning applications, from smartsheet and Asana to Microsoft Project. In my projects, the biggest challenge is often communicating updates to the plan and schedule. For example, Agile teams usually create plans and schedules for each sprint. It takes close coordination, communication, and collaboration to keep everyone working together.
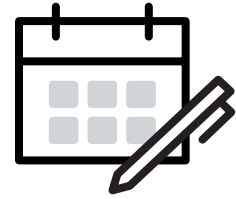
When I work with a team that uses a separate scheduling/tracking application, everyone needs to be given access to the application and training to use it. Team members often dread using project management/tracking software, because it's unfamiliar, confusing, or too complex for their needs. MadCap Central's checklists are a simple way to create, manage, and track project tasks. The tasks are easy to add, and it's motivating to check off finished tasks. When I'm managing a project, I use the Calendar and Checklist to track my team's work.

Adjusting Work Processes and Outputs

To quote Heraclitus, "the only constant is change." Successful project managers not only adapt to changing goals, opportunities, and limitations, they communicate the changes clearly and efficiently. Most project management and planning applications make it easy to adjust schedules and tasks. However, a change is only effective if it is effectively communicated.
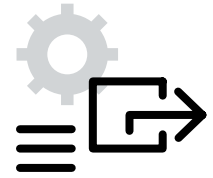
I use MadCap Flare's file tags to track resources and priorities. In a typical project, I will have an "author" file tag to track the primary content author, an "SME" tag to track subject matter experts and reviewers, and a "priority" file tag to track status levels such as "required" and "hold." Everyone on the team can sort and organize the content using the tags, and anyone can update the information as the project evolves.
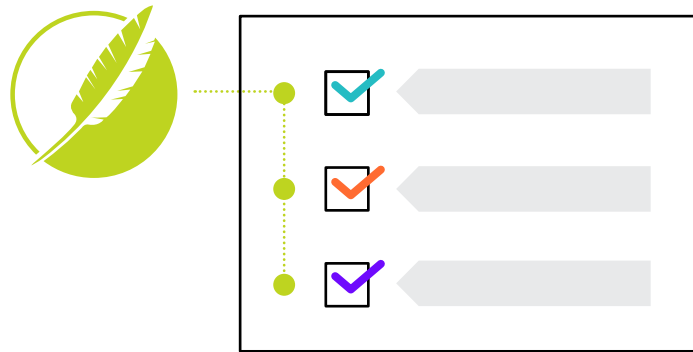
Establishing, Monitoring, and Communicating Progress

A project can easily consist of hundreds or even thousands of tasks. All of these tasks must be planned and tracked, and everyone needs a clear view of the progress to plan their work and stay motivated. Many teams use Kanban boards to organize and track tasks. Web apps such as Trello and Microsoft Planner provide Kanban boards for project management.

MadCap Central provides Task boards that are based on Kanban boards. They can be combined with task notifications when tasks are moved between milestones. The notifications are useful when tasks are behind schedule, and the "task complete" notifications are also very motivating. MadCap Flare's annotations are also a simple way to communicate with and encourage coworkers. I add annotations to topics to thank coworkers for their work, especially when I'm reusing their content. I also add annotations to indicate planned changes, such as when I plan to rewrite content or replace an image.

About the Author

Scott DeLoach is the founder of ClickStart. Scott is a certified MadCap Flare instructor and consultant and the author of *MadCap Flare: The Definitive Guide*. He has been designing and developing technical communication, P&P, learning, and performance solutions for over 25 years.

www.td.org/user/about/ScottDeLoach

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