Budgetprognoses in IT-projecten

**Zo krijg je financiële grip op Agile IT-projecten**

Wim Pierson

Who is your host ?

- Wim Pierson
- Project Manager @PHPro (Cronos Group)
  - Where I had the opportunity to learn & grow
- 8,5 years of experience in digital projects

- Here to share insights & experience
- Questions -> interrupt
- Senior PM?
  - welcome to share/contribute as well during presentation !

a project can be similar to this dinosaur
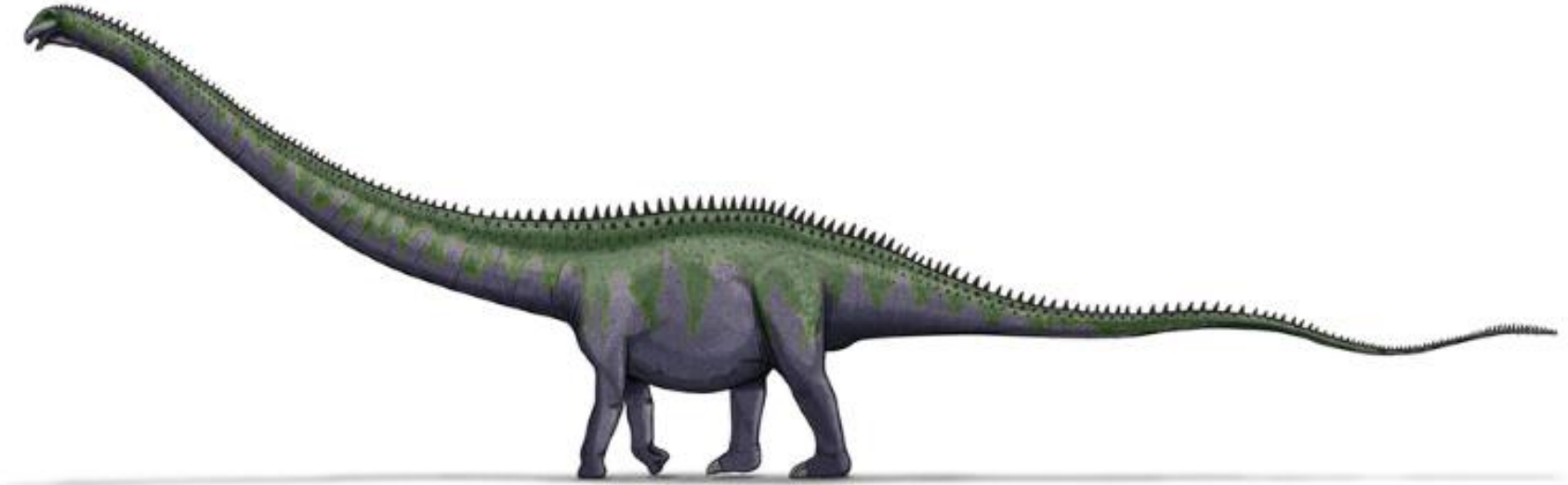
Agenda

1. **Before – what can you do before start of the project ?**

   Or at least at the beginning

2. **Measuring + interpreting = knowing**

   How to have/maintain a quick overview and where you will end up ?

3. **Team temperature**

   Stakeholdermanagement is not only external + generates insights

4. **Managing your customer**

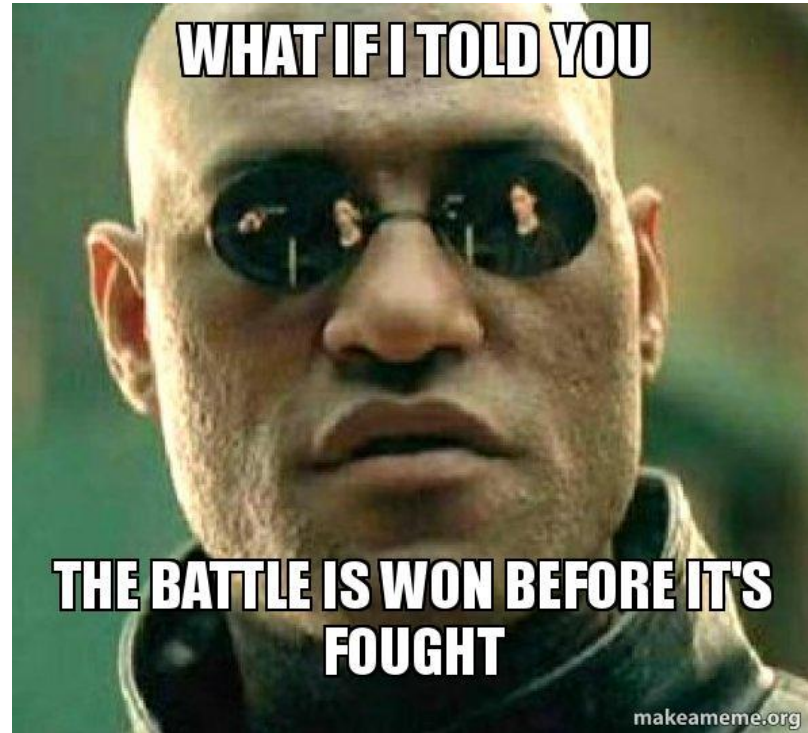   How to get/keep your customer informed and aligned with YOUR story
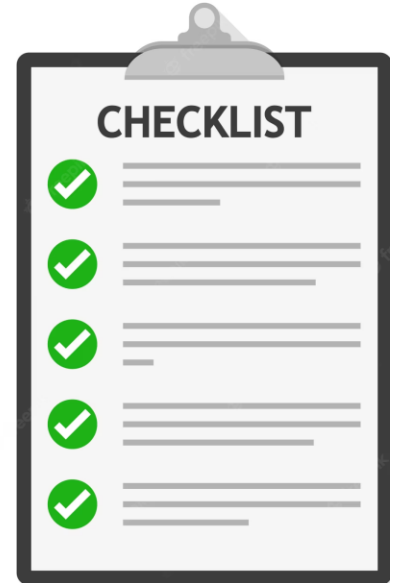
NCOI
LEARNING

1

Before

Better to be safe than sorry !

How can you arm yourself beforehand ?

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Does your lead "check out" -> Qualification during pre-sales phase

- Before asking questions -> what (financial) information is available

- Purpose & goals
- Vision towards scope/planning/budget
- Knowledge/experience with (IT) projects
- Showstoppers/non-negotiables
- Talking with the decisionmakers
- Architecture/context

- Risks
- Before you "bite" -> get a good insight & feeling of your lead
  - Trust your 'gut feeling' (enough) !

Project Charter

- A handy tool for every PM !

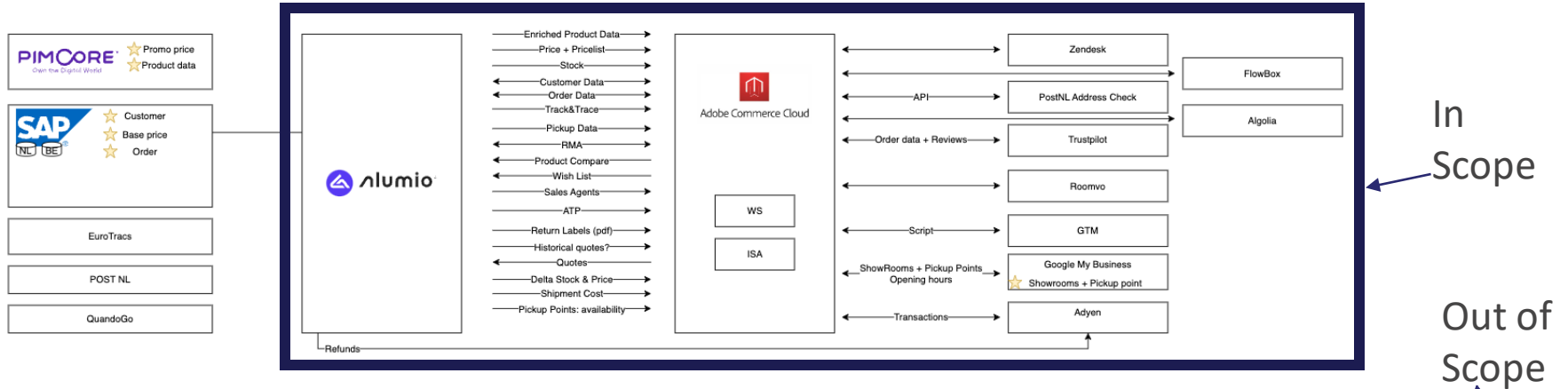# What will you do (and what not) ?

- Have a clear MVP/Project/Phase scope

- Indicate what is part of that scope

- Indicate what is NOT part of that scope

- MoSCoW

- Ask yourself "Why" and what do we gain
  - (to help decide on priority)

Content & MoSCoW

In Scope

Out of Scope

- Make sure the 'big picture' is clear
- Structure your project (epics)
- Indicate where you will focus on

Estimates & MoSCoW

- Not only 1 high level estimation
- Visualize cost of your epics
- Different 'levels' of estimations

Estimations grouped per epic :

	BUDGET & DEV/TEST/FIX PER EPIC (NO SCRUM)					
		BUDGET			DEV-TEST-FIX	
	Unieke epics	Min budget		Max budget	# dev min	# dev max
0		€ 83.000,00	€	96.000,00	83,00	96,00
1	EPIC 1	€ 5.000,00	€	6.000,00	5,00	6,00
2	EPIC 2	€ 60.000,00	€	68.000,00	60,00	68,00
3	EPIC 3	€ 2.000,00	€	3.000,00	2,00	3,00
4	EPIC 4	€ 11.000,00	€	13.000,00	11,00	13,00
5	EPIC 5	€ 5.000,00	€	6.000,00	5,00	6,00

Individual estimations :

	Epic	Fase	MoSCo(W)			BUDGET MIN	BUDGET MAX
A)				Setup project			
1	EPIC 1		M	Feature 1		€ 5.000,00	€ 6.000,00
B)				High level Epic / Domain 1			
1	EPIC 2	1	M	Feature 2		€ 1.000,00	€ 2.000,00
2	EPIC 3	3	S	Feature 3		€ 2.000,00	€ 3.000,00
3	EPIC 2	3	S	Feature 4		€ 3.000,00	€ 4.000,00
4	EPIC 4	3	S	Feature 5		€ 4.000,00	€ 5.000,00
5	EPIC 5	1	M	Feature 6		€ 5.000,00	€ 6.000,00
6	EPIC 2	1	M	Feature 7		€ 6.000,00	€ 7.000,00
7	Events	1	M	Feature 8		€ 7.000,00	€ 8.000,00
8	EPIC 2	1	M	Feature 9		€ 8.000,00	€ 9.000,00
9	EPIC 2	1	M	Feature 10		€ 9.000,00	€ 10.000,00
10	EPIC 2	1	M	Feature 11		€ 10.000,00	€ 11.000,00
11	EPIC 2	2	M	Feature 12		€ 11.000,00	€ 12.000,00
12	EPIC 2	2	M	Feature 13		€ 12.000,00	€ 13.000,00
C)				High level Epic / Domain 2			

Estimations grouped per epic & prio :

	BUDGET & DEV/TEST/FIX PER EPIC (NO SCRUM)						
		MOSCOW	BUDGET			DEV-TEST-FIX	
	Unieke epics		Min budget		Max budget	# dev min	# dev max
0		M	€ 74.000,00	€	84.000,00	74,00	84,00
1	EPIC 1		€ 5.000,00	€	6.000,00	5,00	6,00
2	EPIC 2		€ 57.000,00	€	64.000,00	57,00	64,00
3	EPIC 3		€ -	€	-	0,00	0,00
4	EPIC 4		€ 7.000,00	€	8.000,00	7,00	8,00
5	EPIC 5		€ 5.000,00	€	6.000,00	5,00	6,00

	BUDGET & DEV/TEST/FIX PER EPIC (NO SCRUM)						
		MOSCOW	BUDGET			DEV-TEST-FIX	
	Unieke epics		Min budget		Max budget	# dev min	# dev max
0		S	€ 9.000,00	€	12.000,00	9,00	12,00
1	EPIC 1		€ -	€	-	0,00	0,00
2	EPIC 2		€ 3.000,00	€	4.000,00	3,00	4,00
3	EPIC 3		€ 2.000,00	€	3.000,00	2,00	3,00
4	EPIC 4		€ 4.000,00	€	5.000,00	4,00	5,00

- Working epic per epic -> quicker feeling on velocity / cost projections

"CYA"

- Cover Your A**

- Make sure you prevent yourself from getting into trouble
  - You : "remember I told you that we were going to do it like this ?"
  - Customer : "But I remember it like that"

- Make clear notes
- Communicate decisions
- --> "put it in writing"

Project estimations – CYA

- New Project <> existing project
- Did you really think of everything ?
  - Setup project
  - Analysis, (scrum) meetings
  - Buffers for feedback, Unit testing
  - Time for
    - Technical Architect
    - Technical lead
  - Non-functionals
    - Hosting (set up) & periodic builds/tasks
    - Support browsers/devices, Load/PEN-testing (digital projects)
    - …
  - Bucket to deal with changes -> dealing with it takes time as well ! (see later : T-shirt)
- Go as broad as you can + make it visible to your lead/customer
  - Beter to have the customer say 'it is not needed (now)' than you have to say 'oh no, we did not think of this'

	F. ANA min	F. ANA max	T. ARCH min	T. ARCH max	ANA min	ANA max	DEV min	DEV max	BUDGET MIN	BUDGET MAX
Setup project										
Feature 1	2	4			2	4	12	16	€ 5.000,00	€ 6.000,00
High level Epic / Domain 1										
Feature 2	3	5	4	5	7	10	16	20	€ 1.000,00	€ 2.000,00
Feature 3	3	5	1	2	4	7	8	10	€ 2.000,00	€ 3.000,00
Feature 4	3	5	1	1	4	6	2	3	€ 3.000,00	€ 4.000,00
Feature 5	3	5	4	6	7	11	32	40	€ 4.000,00	€ 5.000,00
Feature 6	3	5	3	4	6	9	12	14	€ 5.000,00	€ 6.000,00
Feature 7	2	3	1	1	3	4	4	8	€ 6.000,00	€ 7.000,00
Feature 8	3	5	3	4	6	9	16	20	€ 7.000,00	€ 8.000,00
Feature 9	1	1	1	1	2	2	4	6	€ 8.000,00	€ 9.000,00
Feature 10	2	3	1	2	3	5	6	8	€ 9.000,00	€ 10.000,00
Feature 11	3	5	1	2	4	7	4	6	€ 10.000,00	€ 11.000,00
Feature 12	3	5	3	4	6	9	20	24	€ 11.000,00	€ 12.000,00
Feature 13	3	5	2	3	5	8	12	16	€ 12.000,00	€ 13.000,00
High level Epic / Domain 2										

Project Estimations – margin/investment

- What will you earn on your project ?

- Project cost is not only people doing something with an immediate deliverable

- Your project is impacted by other parameters :
  - How experienced is your team ?
  - Is the team already working together long, or is it a new group ?
  - Every new project needs time
  - Who made the estimations?
    - An experienced project member
  - Who will do the work ?
    - The same person that did the estimations ?

Project Estimations – margin/investment

Calculate & take into account time

- (pre)sales
- Get to know technology/context
- Generalise for future benefit
- Learning & support

- Purely for 'internal' knowledge
  - Know your margin
  - Follow up on regular basis
  - Is there space for (extra) investment ?

PROJECT   **CUSTOMER**

Consultant		Days	Cost - fee	Revenue - dagfee	Margin
==> Days pre-sales (investment)					
Name 1		-	652,00		-
Name 2		-	420,00		-
Subtotal | Investment in Technology		-	-		-
==> Investment in technology					
Name 3		4,25	427,00	-	-1.814,75
Name 4		7,50	684,00	-	-5.130,00
Name 5		3,50	662,00	-	-2.317,00
Subtotal | Investment in Technology		15,25	-9.261,75		-9.261,75
==> Investment in module					
Name 6		3,00	673,00	-	-2.019,00
Name 7		4,00	454,00	-	-1.816,00
Subtotal | Investment in Technology		7,00	-3.835,00		-3.835,00
==> Investment in coaching and support					
Coaching	Name 3	10,00	427,00	-	-4.270,00
Coaching	Name 4	10,00	684,00	-	-6.840,00
Coaching	Name 5	5,00	662,00	-	-3.310,00
Support	Name 6	20,00	673,00	-	-13.460,00
Support	Name 7	20,00	454,00	-	-9.080,00
Support	Name 8	20,00	438,00	-	-8.760,00
Support	Name 9	20,00	674,00	-	-13.480,00
Subtotaal | Investment in coaching and support		105,00	-59.200,00		-59.200,00
==> Work by consultancy					
Name 1	DEV	27,40	652,00	728,00	2.082,02
Name 2	ANA	0,19	420,00	896,00	89,25
Name 3	DEV	69,23	427,00	728,00	20.838,23
Name 4	ANA	11,63	684,00	896,00	2.466,36
Name 5	DEV	8,04	662,00	728,00	530,31
Name 6	DEV	25,46	673,00	728,00	1.400,23
Name 7	DEV	75,37	454,00	728,00	20.650,01
Name 8	DEV	2,54	438,00	728,00	736,96
Name 9	DEV	38,20	674,00	728,00	2.062,60
Name 10	DEV	4,93	431,00	728,00	1.463,10
Name 11	DEV	1,34	583,00	728,00	194,84
Name 12	DEV	4,41	449,00	728,00	1.229,34
Name 13	ANA	78,37	585,00	896,00	24.372,68
Name 14	ANA	23,45	482,00	896,00	9.708,30
Name 15	PM	0,69	575,00	896,00	220,69
Subtotaal | Verkoop		371,23	-201.413,90	289.458,82	88.044,92

Summary Project CUSTOMER		
Total Revenu	289.459	
Total Cost	-273.711	
Margin	15.748	5,44%

NCOI LEARNING

Manage risks, assumptions, dependencies
Changes & decisions do have impact
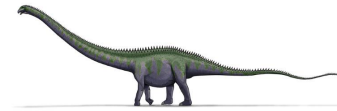
- Unclarity/doubt -> Assumption

Based on this architecture we defined the scope of this proposal as:

- PHPro will do all the routes between Alumio and Adobe Commerce: sending and receiving data in function of the data needed on the e-commerce engine.
- PHPro will not be creating routes if the e-commerce engine doesn't need that data. For example: refunds from SAP towards Adyen.
- PHPro will not be creating routes for the Prestashop routes towards SAP and PimCore or the e-commerce engine.

Assumptions:

- We assume that all other platforms can provide the data on an efficient way needed for the business case.
- PHPro will connect Alumio with Pimcore, SAP and Adobe Commerce. No other platform.

- Known impact/dependancies -> Risks & mitigations

	Risk	Description	Level	Mitigation

1	CPU production server	Last weekends we had performance on prod after mail send (high traffic). We have taken some actions to improve. At this stage it is not yet clear whether these will be sufficient and if an upscale required.	MEDIUM	• Improvements
				  ○ Varnisch VCL
				  ○ Upscale/downscale fix
				  ○ Check bots (later)
				  ○ Investigation uncached query url's
				• Meeting to decide on upscale. Mar 17, 2023
				• Performance open issues:
				  a. **Speed of Squeezely + Spotler fixes**
				  b. Redis (nginx settings): already at the maximum.
				  c. Way of working for campaigns (e.g. collecting data, whitelisting UID's, ...)

2	Resource downscale	Currently we have 4FTE developers in our team. This consists out of 2,5 FTE BE and 1,5FTE. A signifcant downscale (e.g. to 2FTE) might result in below elements:	LOW	• Start with smaller downscale ○ Evaluate after period to check impact on the described elements. • Unofficially confirmed for June, July and August.

- After analysis things will be more clear -> this will have an impact as well
- Take a "picture" on a regular basis (after (important) phases/milestones)

Do you know your key stakeholders ?

- Create a stakeholder map -> overview of people that play a role in the project
- Not only at your customers side, also other parties that are involved

- Handy trick : "RACI" principle

Project	Person 1	Person 2	Person 3	Person 4
Deliverable 1	Responsible	Accountable	Consulted	Informed
Deliverable 2	Accountable	Consulted	Informed	Responsible
Activity 1	Consulted	Informed	Responsible	Accountable
Activity 2	Accountable	Consulted	Informed	Responsible

Apply the "SPOC" principle for project efficiency

- Single Point Of Contact

- PM is SPOC, but you need a SPOC at the customer side as well

- -> make clear who will fulfil this role

- Validate the stakeholder map with SPOC & Project Sponsor -> CYA
  - When you have their 'buy-in', it is easier to manage

- You don't want a sudden "important stakeholder" to show up in the middle of your project

- Also protect yourself from not-important stakeholders, to know what input you can ignore
  - Put that responsibility also at the client SPOC
  - Make sure that you maximize the fact that only relevant input comes your way

Protect & support yourself

- Do you have a coach or (senior) colleague for sparring ?
- 4-eyes principle

- It is always good to have a regular challenging session to
  - Keep the "helicopter" overview
  - Zoom in where needed

- Do this before taking it up with your customer
- Won't be the first time your coach prevents your from doing/saying/promising something you will regret afterwards
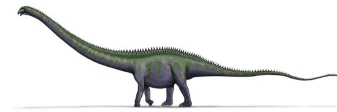
How to prevent ?

- Qualify lead
- Project Charter
- Scope / MoSCoW
- Insight in cost split (role, epic)
- CYA
- Margin
- Assumptions/Risks
- Stakeholders/RACI
- SPOC
- Sparring partner

2

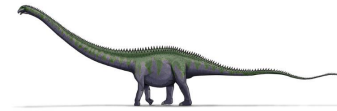# Measuring + interpreting = knowing

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Efficiency in measuring – need to have status insights (fast)

- Measuring = knowing

- YES ! But how much time do you spend/lose <u>every time</u> to get there ?

GOAL :

- Uniformization within the organisation

- Maximize INTERPRETING time, minimize measuring time in Excel

- Maximize time with team, customer…

Efficiency in measuring – need to have status insights (fast)

- At PHPro we work with our "PM Excel", which gives insight in
  - Actuals
  - ETC (Estimate To Complete)
  - EAC (Estimate At Completion)
- Data comes from tools we work with (Jira, TIA, Planning)
  - 1-2u 'configuration' at the beginning of the project
  - 5min per 'photo' during project
  - → Quick answer to question : 'what is de financial status of my project ?'

- Pre-condition : actuals & documentation of tickets needs to be close to 100% !

- **Result : you can have most of your time interpreting**
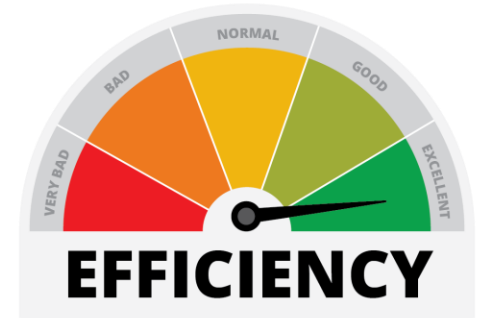
YOU NEED THIS

Configuration

- Budget, general & split up per role/epic

- Link timesheet codes (or your system te match this)

- Link the correct rates you use

- Since we use Jira, we can structure on Epics, Labels or Component (JIRA specific)

Naam	Low	High
PM	44.144,76 €	68.861,97 €
ANA	44.464,00 €	67.984,00 €
PO	41.232,76 €	65.345,17 €
TA	21.168,00 €	31.584,00 €
Sysadmin		
DEV jr	167.221,54 €	264.557,74 €
DEV sr	Zit in DEV budget	
scrum	14.223,24 €	22.502,29 €
Au	24.725,00 €	38.525,00 €
Au	7.820,00 €	15.640,00 €
Ba	690,00 €	1.035,00 €
Ba	12.650,00 €	18.860,00 €
Li	0,00 €	0,00 €
BC	13.800,00 €	25.990,00 €

EPICS

Epics			Uurprijs			
Epics						
Labels						
Components						
Naam	Low	High	Link met TIA		Uurprijs	
PM	44.144,76 €	68.861,97 €				
ANA	44.464,00 €	67.984,00 €	Timesheet Codes			RATES
PO	41.232,76 €	65.345,17 €				
TA	21.168,00 €	31.584,00 €				
Sysadmin						
DEV jr	167.221,54 €	264.557,74 €				

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Status HL

- Visual in EURO

	Budget (€)			Gepresteerd (€)					Verwacht bij einde (€)				
	MIN	MED	MAX	TOTAAL	MIN	MED	MAX		TOTAAL		MIN	MED	MAX
								ETC/REM		EAC			
TOTAAL	€ 318.231	€ 408.282	€ 498.333	€ 402.051	133,0%	103,6%	84,9%	€ 79.498	€ 481.549	151,3%	117,9%	96,6%
PM	€ 44.145	€ 56.503	€ 68.862	€ 39.488	92,3%	72,1%	59,2%	€ 7.872	€ 47.360	107,3%	83,8%	68,8%
ANA	€ 44.464	€ 56.224	€ 67.984	€ 50.212	122,0%	96,5%	79,8%	€ 4.920	€ 55.132	124,0%	98,1%	81,1%
ANA Jr				€ 7.804				€ 2.952	€ 10.756			
PO	€ 41.233	€ 53.289	€ 65.345	€ 46.471	115,7%	89,5%	73,0%	€ 19.680	€ 66.151	160,4%	124,1%	101,2%
TA	€ 21.168	€ 26.376	€ 31.584	€ 12.332	61,5%	49,3%	41,2%	€ 12.932	€ 25.264	119,4%	95,8%	80,0%
Sysadmin	€ -	€ -	€ -	€ 4.178	0,0%	0,0%	0,0%	€ -	€ 4.178	0,0%	0,0%	0,0%
DEV jr	€ 167.222	€ 215.890	€ 264.558	€ 241.566	144,5%	111,9%	91,3%	€ 31.142	€ 272.708	163,1%	126,3%	103,1%
DEV sr				€ -				€ -	€ -			

Manual update days of functional profiles according to planning

- Visual in DAYS

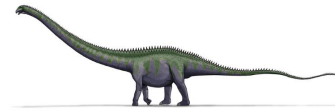|	Budget (Dag)			Gepresteerd (Dag)					Verwacht bij einde (Dag)				
	MIN	MED	MAX	TOTAAL '23	MIN	MED	MAX		TOTAAL		MIN	MED	MAX
								ETC/REM		EAC			
TOTAAL	362,5	465,4	568,3	302,17	133,0%	103,6%	84,9%	88,1	570,3	157,3%	122,5%	100,3%
PM	44,9	57,4	70,0	27,06	92,3%	72,1%	59,2%	8,0	49,4	110,1%	86,1%	70,6%
ANA	45,2	57,1	69,1	9,13	122,0%	96,5%	79,8%	5,0	60,1	133,1%	105,3%	87,0%
PO	41,9	54,2	66,4	34,39	115,7%	89,5%	73,0%	20,0	68,5	163,4%	126,5%	103,1%
TA	21,5	26,8	32,1	5,55	61,5%	49,3%	41,2%	13,1	26,4	122,6%	98,4%	82,1%
Sysadmin	0,0	0,0	0,0	3,47	0,0%	0,0%	0,0%	-	5,4	0,0%	0,0%	0,0%
DEV jr	209,0	269,9	330,7	214,64	148,6%	115,1%	93,9%	38,9	349,5	167,2%	129,5%	105,7%
DEV sr				0,00				-	-			

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Status per epic

- Per epic : actuals & ETC
  - also % in comparison with budget and EAC
- Corrections (due to learning)

		Budget (Dag)			Gepresteerd (Dag)						Verwacht bij einde (Dag)					
		MIN	MED	MAX	TOTAAL '23			MIN	MED	MAX	TOTAAL		MIN	MED	MAX	
											ETC/REM	EAC				
	TOTAAL	362,5	465,4	568,3	302,17			133,0%	103,6%	84,9%	88,1	570,3	157,3%	122,5%	100,3%	
	PM	44,9	57,4	70,0	27,06			92,3%	72,1%	59,2%	8,0	49,4	110,1%	86,1%	70,6%	
	ANA	45,2	57,1	69,1	9,13			122,0%	96,5%	79,8%	5,0	60,1	133,1%	105,3%	87,0%	
	PO	41,9	54,2	66,4	34,39			115,7%	89,5%	73,0%	20,0	68,5	163,4%	126,5%	103,1%	
	TA	21,5	26,8	32,1	5,55			61,5%	49,3%	41,2%	13,1	26,4	122,6%	98,4%	82,1%	
	Sysadmin	0,0	0,0	0,0	3,47			0,0%	0,0%	0,0%	-	5,4	0,0%	0,0%	0,0%	
	DEV jr	209,0	269,9	330,7	214,64			148,6%	115,1%	93,9%	38,9	349,5	167,2%	129,5%	105,7%	
TIA	DEV sr				0,00							-				
JIRA	JIRA - Onderdeel/potteke	226,2	292,4	358,6	296,71	Correctie: -56,21	Werkelijk: 382,01	131,2%	101,5%	82,7%	25,6	322,3	142,5%	110,2%	89,9%	
	scrum	17,8	23,0	28,1	16,93		16,93	95,2%	73,8%	60,2%	5,1	22,0	123,9%	96,0%	78,3%	
		30,9	39,5	48,2	58,77	-8,43	67,20	190,1%	148,7%	122,0%	0,9	59,7	193,1%	151,0%	124,0%	
		9,8	14,7	19,6	10,26	-0,50	10,76	104,9%	70,0%	52,5%	0,2	10,5	107,0%	71,4%	53,5%	
		0,9	1,1	1,3	0,01		0,01	0,7%	0,6%	0,5%	-	0,0	0,7%	0,6%	0,5%	
		15,8	19,7	23,6	44,17	-8,78	52,95	279,4%	224,3%	187,4%	3,8	47,9	303,1%	243,4%	203,3%	
		0,0	0,0	0,0	18,62		18,62	0,0%	0,0%	0,0%	3,1	21,8	0,0%	0,0%	0,0%	
		17,3	24,9	32,5	0,21		0,21	1,2%	0,8%	0,6%	0,3	0,5	2,9%	2,0%	1,5%	

Non Billable

- Total

- Technology

- Learning &
- Support

Attention points & gains

- By dividing into roles/epics, you can follow up more in detail
  - Quick insights in team 'velocity' -> also check here why
  - No "budget is ok" until "budget is not ok"
- Make sure that all the work is in your backlog (Jira)
  - See later 'Backlog management'
- Make sure that everything that needs to be done is estimated
  - Don't take estimations for grantend / Definition of Ready
- Make sure you also foresee time for TA, feedback, releases, scrum... not only work

- Limit time to get to status, maximize time to challenge, follow up
  - Do monitor evolution actuals, ETC, EAC

Measuring + interpreting = knowing

- Find a way to quickly get insight
- Documentation & correct actuals is key
- Split per role/epic/feature
- Non-billable insights
- Understand velocity quickly
- All work estimated & planned
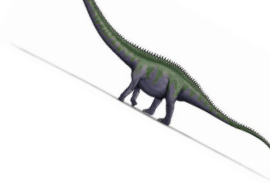- Not only plan the work (overhead)

3

Your teams' temperature

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First things first -> DO A KICK-OFF (prepared)

- Prepare that kick-off meeting !
- Prepare it with the impacted stakeholders
- Make sure there are no (unpleasant) surprises
  - ...our SPOC will be *name*...

- Do this internal & external
- Make sure all stakeholders are looking same way

- Get the teams together frequently
  - Efficiency in collaboration
 - Team feeling & understanding from both sides
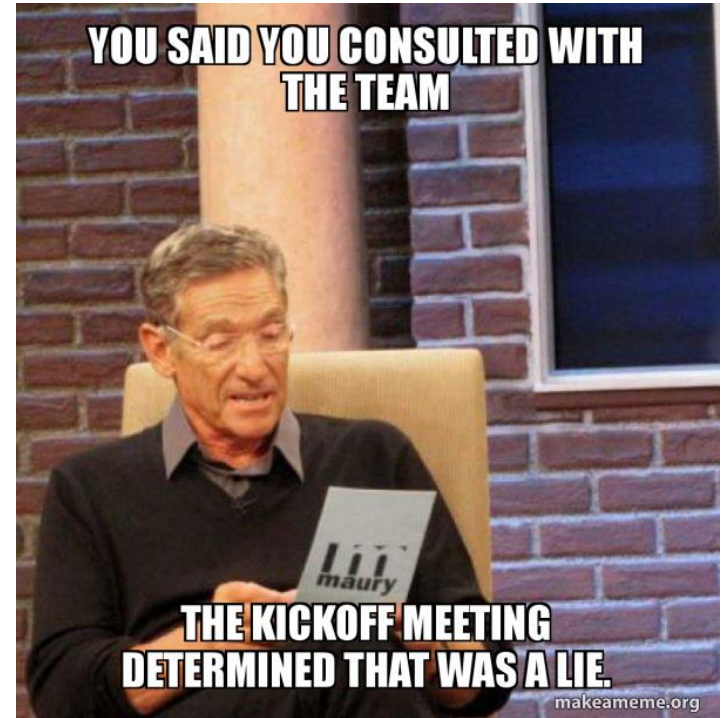
Get your team on board (with the administration & why)

- "*actuals & documentation of tickets needs to be close to 100%*"
  - Your Project/financial status depends on administration of your team
  - Key is to make sure that they understand why (should not ONLY be an obligation)

- Envolve the team in your financial insights, this will contribute to their
  - Context
  - Ownership
  - Feedback ! (see next slide)
- Also prepare & report steerco to the team

- But don't be fooled -> weekly follow up will be needed (actuals & estimates)
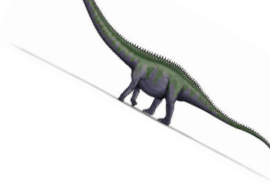
# Measure temperature – Observe & listen to your team

PM is not only numbers & excel

- Ask open questions to get insights where problems might arise that impact budget
  - "What remarks do you have ?" (ask individually & don't ask "do you have remarks ?")
  - "We go live July 15th, does that seem feasible ?"
  - "How goes the team ?"
- Observe : don't lose yourself the entire time in excel, make sure you join your team
  - Gives you the opportunity to see reactions, to make sure everyone speaks up
  - If you notice that your presence has the opposite effect -> find yourself a 'representor' within

- Within Scrum there are moments to get feedback (like a retro), but this does not work for everyone. Make sure you follow up individually.
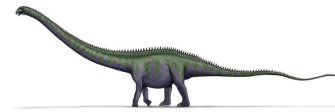
Gut feeling & common sense

- Frequently take time to step back and look, what caches your attention ?

- Nothing ? Look harder ! Does it all make sense, seem logic ?

- Still nothing ? Play a bit the 'devils advocate' -> try to think yourself what might go differently

- Listen to yourself :
  - What does your gut tell you ?
  - What does your head tell you ?
  - Any doubt, even the slightest thing -> look into it

- You can always spar about it with your team and/or coach
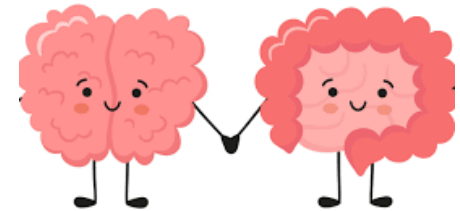
Team Temperature

- Prepared Kick-off
- Envolve the team in high level overview
- Listen/observe
- Gut/common sense

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4

# Manage your customer

Project Management triangle as context

The "Devils Triangle"

- As PM your responsibility lays on 3 key factors
- !!! An optimal choice for all 3 factors is impossible in 1 project !!!

- They are connected to each other, like an elastic band, with 'Quality' as a central and important value
- "Pulling" on 1 (or more) of these factors will impact the others
  - Make sure that the quality of your project does not go down the drain by giving in on everything

- This might help to share this with the client, to get on the same page
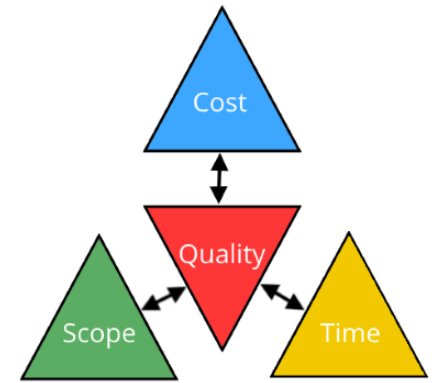
You want to finish the project

- You have to manage this 'moving' project (agile)
- You have to make sure we focus on the agreed prios

- The aim is to get to a point where you can say 'this is done'
- Ideally you have a short "tail" on your dinosaur

- The thing is: a lot of questions/feedback/expactations come your way
- It is import you capture that, we don't want to miss anything
- But we don't have to DO everything (now)

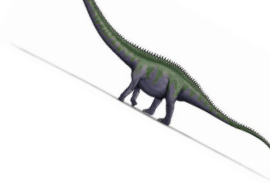- Do a closure meeting/lunch

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LEARNING
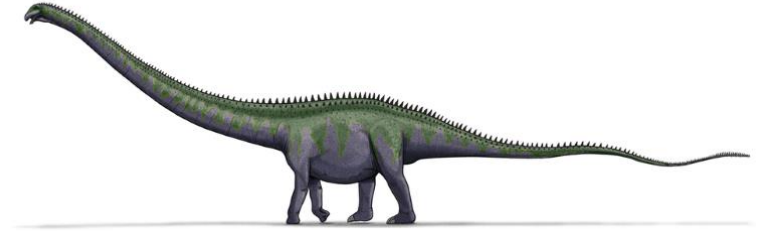
You want this
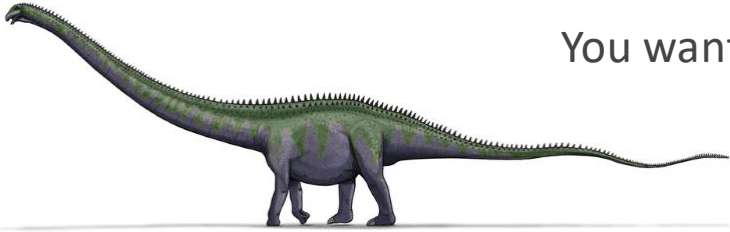
Instead of this
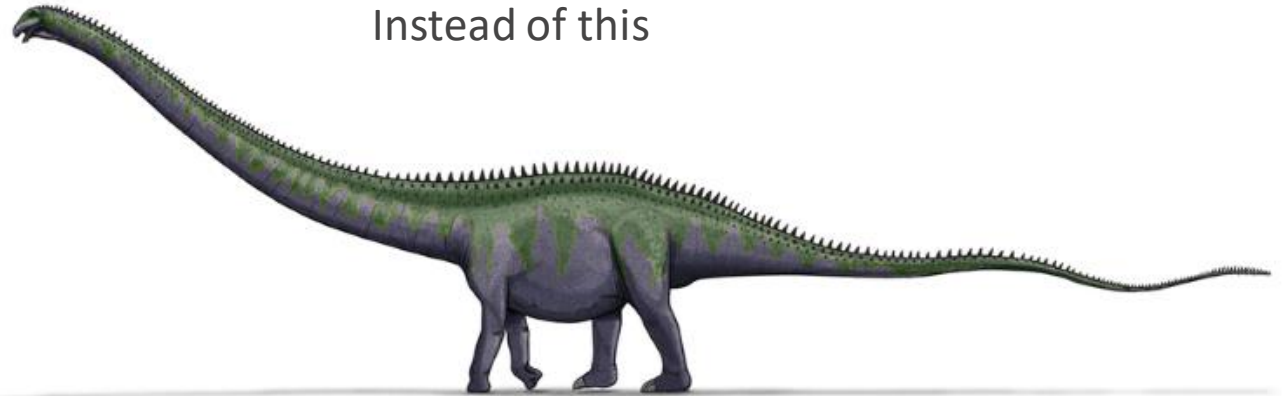
Backlog management

- It is important to capture everything, but qualify

- Is this in scope ?
  - Yes ? -> OK -> make a ticket/action point
  - No ? -> parking lot (see next slide)
  - No, but it is blocking for the project ? -> estimate and ask for approval (see next slide)

- Work with labels/groups (structure) to keep an overview on the scope-evolution (and budget)
  - For example : label tickets as 'MVP-extra-scope' in Jira (or make a list in excel)

- Again : you want to hear your customer say 'ok, this is done for me'
  - Ask why it is not done and what is expected for closure
  - Somethings 'good enough' is good enough
  - Definition of Done

Parking lot & T-shirt sizes

Topic	Omschrijving	Status	MoSCoW	Impact Size	Decision Q2
Load testing	Akeneo + Symfony	TBD		M	
Relatie tussen attributen	Zeefnetten - zeefmachines: • Concept ongoing • Akeneo development • Symfony development	TBD			
Nieuwe status bij aanvraag rol verhuurder	Nieuwe status voorzien voor een actief bedrijf (huurder) dat een account als verhuurder heeft aangevraagd die nog niet toegekend is. Filter voorzien op deze status in het overzicht van bedrijven.	TBD	S	S	NIET
Verwijderen van bedrijven en gebruikers	Wanneer we een gebruiker verwijderen, willen we wel dat zijn aanvragen in het platform blijven (anoniem aan het bedrijf gekoppeld).	TBD	S	S	NIET
Search optimalisatie	Zoekmachine moet om kunnen met: • enkelvoud/meervoud • synoniemen en alternatieven	ROADMAP	S	L	LOW
Individueel toevoegen van een tuig		ROADMAP	C	XXL	MEDIUM

Parking lot :

• keep track of all the ideas

• T-shirt sizes : a handy way to give a high level insight quickly & help decide

T-shirt	Estimated time
XXS	< 4h
XS	4h - 1 day
S	1-2 days
M	3-5 days
L	5-10 days
XL	+10 days

Manage Customer

- PM Triangle
- Get to finish a project (split in phases)
- Backlog management
- Parking Lot
- T-shirt Sizes

Thanks !

Questions ?
Feedback ?

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