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# LEAN GUIDE TO Interactive Media Project Management

This lean guide will walk an interactive media project manager through every step in the process of managing the design and development of interactive media projects by providing a set of practical and easy to use worksheets with explanation for usage.

# Getting Started

The first step in your interactive media project management process is to define the product to be developed.

INITIATING THE PROJECT

# Defining Your Project: Scoping

One of the most important ingredients for creating a quality interactive product is to focus on a good definition of the product to be developed; this first step is called *scoping the project*.

To begin scoping, you would have to begin by presenting

your client with a [creative brief](#).

## WHY DO YOU NEED A CREATIVE BRIEF?

1. To find out the client's vision of the product
2. To visualize the mood the client wants to create for the product
3. To learn about the desired technical functionality of the product and technical requirements
4. To learn more about the client's competition for the new product
5. To learn more about the client's budget

The creative brief is a simple questionnaire that after completed by a client, introduces you with the overall requirements of the project. Without a complete creative brief, an interactive project becomes very difficult to define. The creative brief questionnaire can be provided to the client to complete, but the most effective way to make sure the creative brief is completed thoroughly is to conduct a client interview.

A face-to-face client interview will give the project manager the opportunity to ask as many questions as necessary for the clarity of definition of the product's future desired features, technical requirements, and tentative budget.

Keep in mind that the creative brief is not a document of details but of preliminary specifications that gives the team an overall idea of the different creative and technical components of the project.

The first worksheet included in this chapter will help you complete a creative brief. All the information collected in a creative brief should serve as a starting point for the idea development stage of the project when designers and developers get together to brainstorm about the product's form and function.

The initial set of requirements found in a creative brief can be shared with the project team during the first meeting, and a summary can also be included in a [project charter](#).

It is your duty as a project manager to collect the information for the creative brief from the initial client interview, or request it completed in a digital format directly from the client.

The creative brief may also be known as a “needs assessment”. Generally, we will assess what needs to be designed and developed based on the desired specifications from the client who articulates the business value of these general specifications.

The Creative Brief Questions are outline in [worksheet 1.1](#) -

## WORKSHEET 1.1 - The Creative Brief

### CREATIVE BRIEF FOR PROJECT \_\_\_\_\_

Describe the future interactive digital product's primary purpose

Describe long-term goals for the product

Describe the product's target audience. Describe a typical user profile in detail. What do they care about? Profile more than one if relevant.

Describe how you want the audience to respond to the visual design of the product. How should the product be perceived? Professional, forward-thinking, fun, etc.

What are some specific visual goals the site should convey? For example: juvenile, community, etc.

Provide at least three similar products that are already in the market with the same or similar primary purpose.

What is the overall message you are trying to convey to your target audience? For example: easy, comprehensive, cost-effective, secure, reliable, efficient, etc.

CREATIVE BRIEF FOR PROJECT (CONTINUED)

How will you convey the overall message? Effective messaging through copy?	
How will you measure the success of the product?	
What would set this product apart from what is already in the market to serve the same or similar purpose?	

*Worksheet 1: The Creative Brief Continued*

# The Agreement

Defining the preliminary requirements for the project with the creative brief is the foundation of the project proposal. An agreement with the client will initiate the project.

A proposal must include at a minimum the project specifics, cost, copyrights and warranties to be accepted by a client. The primary goal of the agreement is to demonstrate to the client that the project is thoroughly understood. After a pro-

posal is accepted, the agreement to proceed with the project needs to be solidified. If your firm requires a formal client agreement sign-off, then the proposal serves as a

## THE PROJECT PROPOSAL

1. Defines the project's goal
2. Defines the problem and describes the proposed solution
3. Proposes a tentative timeline to create the product solution
4. Proposes a development budget / production cost
5. Terms of acceptance for the client

source for the agreement. If a signed agreement is not necessary in your organization, a project charter may be enough to move the project along.

If your duty is to produce a project proposal for client acceptance, be sure you include the following information:

- Definition of the parties involved; client and production team
- Project name
- Objective / Goal
- Problem
- Proposed solution
- Proposed timeline to produce a solution
- Costs
- Cost-benefit analysis
- Known business requirements
- Scope
- Out-of-scope but necessary requirements
- Known obstacles
- Known risks
- Proposed schedule

- Known impact of late delivery
- Terms of Acceptance
- Copyrights
- Warranties
- Statement of Work
- Client acceptance statement and signatures

When a project charter is necessary to announce the initiation of the project and begin its implementation, you may want to include the following:

- Project name and background
- Objective
- Statement of initiation
- Statement of support for project
- Name of project manager
- Team & team roles (if known)
- Stakeholders
- Initial timeline



NOTE: The project charter is a short document that outlines the information above succinctly and clearly.

[Worksheet 1.2](#) can be used to draft a project charter.

As you may have noticed, the project charter already outlines the team. For interactive media products; the team can be distributed or local; it can also be in-house or contracted. However, the most important to outline is to communicate the skills that are needed for this team to be able to contribute to the product production.

In a project charter, it is acceptable to outline the project team based on skill sets. [Worksheet 1.3](#) be used to document team selection. At the same time, a project manager is able to identify the skills needed for the project, and have a base for contracting or hiring team members. We will concentrate on skills for the development of the media.

Roles for interactive media development vary and are based on the product to be developed. Sample roles for an interactive web product may include:

- Information Architect
- Graphic Designer
- Web Designer
- Web Developer
- Database Designer / Developer

## WORKSHEET 1.2 - Project Charter

### PROJECT CHARTER

Project Title:	
Background Summary:	
Business Case Project Objectives:	
Project Manager & Sponsor	
Team Members*	
Stakeholders	
Estimated Initial Timeline	
Support for Initiation Statement and Acceptance of Project	
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Stakeholder Signature	Date

- Web Writer

NOTE: [Worksheet 1.3](#) below

### WORKSHEET 1.3 - Team Selection Worksheet

#### TEAM SELECTION WORKSHEET

**PROJECT TITLE:** \_\_\_\_\_

**SUMMARY PROJECT DESCRIPTION:**

Role Description	Skill	Needed by
<p>Graphic Designer: Designs visual elements for the look and feel of the product.</p>	<p>Graphic design ability, Typography, Web / Mobile Layout, excellent knowledge of composition, color, imagery, photography, vector art, illustration 2D graphics.</p> <p>Software preferred: Adobe Creative Suite</p>	<p>Starts and involvement in Phase I</p>

# Planning

Planning begins with risk management and ends with developing work breakdowns where tasks are specific to the project and help the interactive project manager to choose the best way

to control the execution of a challenging product design and development process.

First, a project manager assumes which risks will present themselves, and plans for them. During the project, risks are triggered and unknown risks become known. A project manager must be ready, and the best way to be ready is to document risks.

The following [risk worksheet](#) will help you document the risks for a project and decide a course of action for each. To calcu-

late the expected value of the risk which will help you determine the value base by which you will decide how much to spend reducing the risk. The formula is:

$$\text{Probability} \times \text{Impact} = \text{Expected Value}$$

You can use a probability matrix to calculate the expected value.

**WORKSHEET 2.1 Project Risk Worksheet**

<b>PROJECT RISKS</b>			
<b>RISK DEFINITION</b>	<b>TRIGGER</b>	<b>VALUE IMPACT BASED ON PROBABILITY</b>	<b>STRATEGY / RESPONSE PLAN</b>
Graphic Designer on family leave	Known date of arrival for this graphic designer's baby came in early. He calls to alert the team	50% chance baby comes in early  value to replace work for six weeks \$700/wk contract labor  value impact \$2,100	Accept risk.  Contract work at += \$200/wk

**FIGURE 2.1 Matrix sample**

3	5	15	25
2	3	9	15
1	1	3	5

1 2 5

**PROBABILITY %**

**IMPACT (\$ cost)**

## Know Your Assets

Interactive media projects are challenging because many digital assets are created specifically for the project, however, a project manager may be able to use already existing assets that can be used and save on development cost.

List your digital assets using this worksheet and be ready to call upon some of them to be enhanced during the project execution phases.

WORKSHEET 2.2 Assets Inventory

ITEM DESCRIPTION	FILE LOCATION	WHEN NEEDED	DETAIL ENHANCEMENT / UPDATES
Procedure video	H:\\hospital \marketing \videos	Phase II	Cut procedure 2 / Keep only 13 seconds

# Framework Selection, Controlling and Executing

Interactive media projects are unique and require unique approaches to get a team together to get tasks done. As tasks are planned and executed, there are modern and dynamic ways

to deliver the business value that a client would appreciate.

The dynamism in development that delivers business value right away is achieved by modern development frameworks. In this lean guide, the framework chosen was Scrum.

Scrum is an iterative framework that concentrates on delivering the product in working condition without taking too much time with the pre-production planning of traditional work breakdown structure documentation.

The emphasis of the Scrum framework is on team dynamics during the development process and how the team embraces the change that takes place during the project and that ultimately shapes the direction of the product design and development.

At this point of the project, you have a very clear sense of the product that needs to be developed. You also know the skills that you need your team to have. The Scrum framework allows you to break down the roles barrier and bring the team together along with their skills and talents to concentrate on the product design and iterative production. To this end, re-group your team, including yourself, into the following Scrum roles: the product owner, the scrum master, and the team member.

To immerse your team into the Scrum working cycles, you need to introduce them to the framework's rules, beginning with the Scrum Manifesto below:

The Scrum Manifesto:

Individuals and interactions over processes and tools  
Working software over comprehensive documentation  
Customer collaboration over contract negotiation  
Responding to change over following a plan

The [Scrum Team Basics Worksheet](#) is useful for a project manager who is introducing the framework to his/her team. Because the Scrum framework concentrates heavily on communication among team members, there are daily stand-up meetings to facilitate to make sure the progress is shared and any impediments are communicated and taken care of during and in-between sprints (development period for iterations of the product), a working schedule for end of sprint meetings as well as daily stand-up meetings is necessary for a project manager.

The [Scrum meeting planning worksheet](#) is a tool that a project manager who is implementing the Scrum framework can have to help organize the meeting dates that take place during the process.

Recognizing the team player roles and scheduling communication is not enough to implement the Scrum framework well with a design and development team. To be most effective, a project manager who wants to make the most out of this framework must become very familiar with it. This lean guide provides you with a few re-

## WORKSHEET 3.1 Scrum Team Basics

### SCRUM TEAM BASICS

ROLE	RESPONSIBILITIES	List Team Members
Product Owner	<p>Holds the vision for the product</p> <p>represents the interest of the business and customers</p> <p>Owns the product backlog</p> <p>Prioritizes</p> <p>Creates acceptance and criteria</p> <p>Available to answer product questions</p>	<p>[Only one team member can be a product owner]</p> <p>[Product owner role can be the project manager's role as the project manager represents the interest of the customer/client.]</p>
SCRUM Master	<p>Meeting Facilitator</p> <p>SCRUM process expert and advisor</p> <p>Team coach</p> <p>Risk Manager</p>	<p>This role can also be fulfilled by a project manager if he / she is not in the product owner role.</p> <p>Ideally, this role is filled by a good facilitation who is very familiar with SCRUM framework practice.</p>
Team Member	<p>Responsible for development work</p> <p>Self-organizing</p> <p>Owns his/her own development implementation decisions and estimations or deadlines.</p> <p>Communicates his decisions and estimations to the product owner.</p> <p>Avoids staying within his/her own expertise and embraces other roles to advance the team's work</p>	<p>Design and Programming personnel</p>



sources that you must be very familiar with to be successful with this implementation.

Recommended resources for Scrum beginners include:

- The Elements of Scrum by Chris Sims and Hillary Louise Johnson

WORKSHEET 3.2 Scrum Monthly Meeting Plan

SCRUM ACTIVITIES FOR MONTH _____	DATE
Daily stand-up meeting	
Sprint team review & Sprint Planning	
Sprint review with stakeholders	
Sprint Retrospective (lessons learned)	

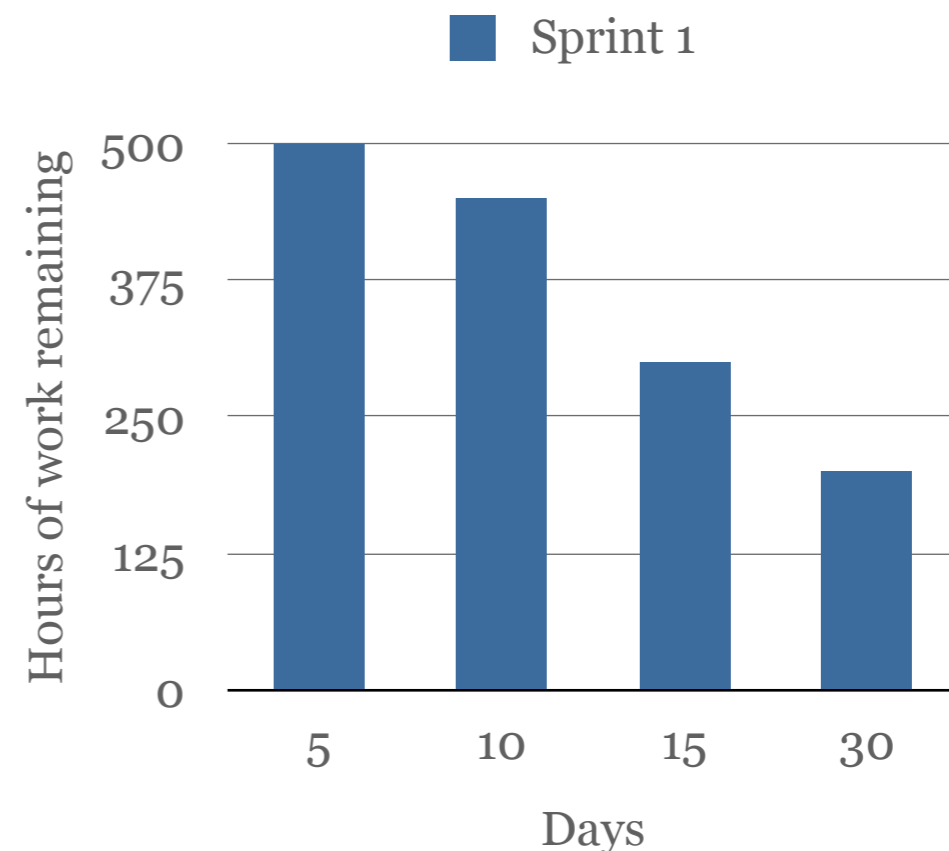
For meetings, scrum artifacts are necessary such as burnup and burndown charts with user stories for the sprint being discussed in the meeting.

- Exploring Scrum: The Fundamentals by Dan Rawsthorne and Doug Shimp

Other useful Scrum training and certification resources online include:

- Scrum Alliance (<http://www.scrumalliance.org/>)
- Scrum.org (<http://www.scrum.org/>)
- Scrum Methodology (<http://scrummethodology.com/>)
- Introduction to Scrum movie (<http://youtu.be/XUollRltyFM>)

Burndown chart example for executive and sprint planning meetings:



Certainly, the Scrum framework can make a difference in any software project with interactive features and close customer feedback requirements, but it is not the only agile framework available.

As a project manager, it is important that you evaluate options for development interaction with your team that are effective and fit well within your organization's culture. Among other agile development frameworks to consider, view:

- Extreme Programming  
(<http://www.extremeprogramming.org/> )
- Scrum-ban  
(<http://leansoftwareengineering.com/ksse/scrum-ban/>)
- Kanban (<http://agile.dzone.com/news/defining-kanban>)
- PMP Agile Project Management  
(<http://www.pmi.org/Certification/New-PMI-Agile-Certification/PMI-Agile-Toolbox.aspx>)

# Closing



Every project comes to a close after its development and release. Whether the team released the project slowly in working iterations, or completed the final version of the project for release to the user fast and efficiently in just one long well executed sprint; it is important to deliver the project and reflect on its development.

As a rule of thumb, teams usually conduct a retrospective, a lessons learned meeting as an opportunity to see what can be improved the next time a similar project comes along. It is good to recognize opportunities for improvement.

As you close your project and deliver it to the client or to your users, be sure that you have addressed the acceptance in writing. A statement by which a project is officially closed, or is clear that further development must be planned and budgeted in the future.

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This lean guide to interactive project management is designed to be a quick reference to the most important considerations for project development. I appreciate your interest in managing interactive media projects and getting an introduction with this guide. Good luck with your projects!

Terry Patterson