

## 18. Vandergrift\_Melvin\_Barnard: PM in All The Right Places

**00:02 Kendall Lott:** Hey, PM community. With this podcast we launch the hour-long format designed for PMI PDU credit. For this production we bundled segments from earlier podcasts around a common narrative, in this case, project management where you didn't expect it. For those of you who are PMPs, the podcast can now be counted for one PDU. If you want to record your PDU, stay tuned for the end of the podcast where we will tell you how. Final Milestone Productions and the Washington DC Chapter of the Project Management Institute present PM in All the Right Places.

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**00:34 Speaker 2:** From the Washington DC Chapter of the Project Management Institute, this is PM Point of View, the podcast that looks at project management from all the angles. Here's your host, Kendall Lott.

**00:44 KL:** Today we have four tales of professionals acting as project managers in what might be considered unusual situations from a PM's Point of View. The theater production manager, the wedding planner, the vintner, and the political campaign manager. They all have similarities with project management, but seen through the PM Point of View, there are interesting differences in the knowledge areas that present the most challenges. These professionals face interesting twists in the saga that we all know as The Story of Project Management. The first milestone of our story? The theater production manager's tale.

**01:18 Deborah Vandergrift:** "The show must go on," is not just a romantic idea, it's a business imperative.

**01:24 KL:** How would you like to manage a project with porous scope, a set budget, and an unmovable deadline, and the quality of the project output is, well, almost designed to be unpredictable? I'm talking project management in the fine arts here at the Shakespeare Theater Company in Washington, DC, where the final output has...

**01:43 DV:** There's the court and the forest, and there are fairies, and there's magic, there's fighting.

**01:49 KL:** Today we talk with Deborah Vandergrift, the Chief Production Manager of the Shakespeare Theater Company, a premier and Tony Award-winning regional theater company with the mission and vision to bring classical theater in a modern, accessible style to theatergoers of our region.

**02:05 DV:** I am responsible for all of the physical production that you see on stage: The sets, the costumes, the props, the lights, the sound. I'm responsible for the stage managers who run the rehearsal process and run all of the performances. I am responsible for sort of producing and putting together all the contracts, and hiring the artists, and hiring the staff, and just getting the production that the audience eventually sees from the beginning to the performance.

**02:42 KL:** So how did you get here? So what is the background that makes you a Chief Production

Officer that has these project management roles?

**02:48 DV:** I was involved in theater in high school and college. I was a double-major in theater and English in college. I have a lot of good organizational skills, and I enjoy organizing things, and solving problems, and putting pieces together, and removing obstacles. And so I decided to go to graduate school for stage management, which is certainly a form of project management, because they're given the responsibility of helping the director get the show rehearsed and communicating the things that director needs from scenery and costumes, etcetera.

**03:21 DV:** I was a stage manager for about 15 years, and I became more and more interested in the broader picture, whereas stage management, obviously, gets very detailed, like who's wearing what pair of gloves in each scene, and if they come off stage-right, do they have to be tracked by somebody stage-left? And that's all extremely important. But I became more interested in, "Well, how does one choose a season?" and, "How does one decide how many crew members we're going to have?" And, "Why would you make a decision to have four different settings in a play instead of three, or five?" And, "How do you put the pieces together on a larger scale to make this happen?"

**04:04 KL:** Wait. Did I just hear scoping, and resourcing, and integration? That sounds like project management.

**04:11 DV:** And I eventually moved into production management, managing all of the shows for any given season, and all of the people working on them.

**04:21 KL:** When you were studying as stage manager, and also as production manager, those are kind of two levels, was that taught to you as an idea of repeatable processes, or is that taught to you as your part of the artistic endeavor and it's always different and fascinating? [chuckle]

**04:37 DV:** The answer is yes to both.

**04:37 KL:** Both. Okay.

**04:39 DV:** But there are repeatable processes. There are standards as with, I think, anything. You don't need to reinvent the wheel for every single process.

**04:47 KL:** What types of things tend to be standard?

**04:49 DV:** Scheduling. Certainly, we work with unions and collective bargaining agreements, so the actors and stage managers are members of a union, and there are limits to the amount of time you can work them and the breaks that they need, etcetera, etcetera. So there's a way to approach managing that and scheduling. There's sort of an industry expectation about how a rehearsal will be supported. If a set is designed with many different kinds of combinations of walls. Usually that design is complete and approved before the show goes into rehearsal. So the stage management staff in the rehearsal hall, which is just a big, empty room, will tape out those walls on stage. So, there are lots of things like that that are, more or less, industry standard. That said, there are theater companies and directors and artists who work in different ways, who work beyond the bounds of that. So, flexibility is important.

**05:52 KL:** When you start up a specific production, do you have a case where you were going in

one direction and then you're having to struggle with someone saying, "We need to change something," that you would consider in the scope. Do they change the requirement you're responding to?

**06:08 DV:** Yes, sure.

**06:09 KL:** Does that actually happen?

**06:10 DV:** That actually happens. It often happens in rehearsal and there's a lot of discussion about, how much is a "reasonable amount of change"?

**06:19 KL:** You're a project manager.

[laughter]

**06:21 DV:** And because you want to allow for that collaboration, because that's what... The collaboration and the ability to change, and the ability to not stay within a certain amount of confines is part of the way we define creative thinking, right? So you don't want to completely forbid that, because then you end up with boring theater and what's the point? On the other hand, if you do it too much you end up with nothing, because you've extended beyond your resources.

**06:50 KL:** Right, you're blowing the budget?

**06:51 DV:** Yeah.

**06:51 KL:** Yeah, we talk about the triple constraint, the scope, the amount of money you have, the amount of time you have. So I'm aware that the schedule matters to you, right?

**07:00 DV:** Absolutely. I have a hard deadline, which is the first paid public performance, and every performance thereafter. "The show must go on", is not just a romantic idea, it's a business imperative, because if I don't have that performance ready for the people who've paid for it, then I either have to exchange their tickets, which lowers my inventory for later in the run, or I have to give them a refund, which I think we agree that's not a good business practice to aspire to. So we know that there's that hard deadline, but there's a lot of moving pieces that build up to that, and I think we are constantly re-examining if the subset of time we've set aside for each goal is appropriate.

**07:48 KL:** The schedule is imperative, it cannot be lost. Cost management, you're given a budget, I assume. That sounds familiar?

**07:55 DV:** I create the budget.

**07:56 KL:** You create it?

**07:56 DV:** Yeah. If someone tells me "We want to do A Midsummer Night's Dream," I can look at the number of settings, so there's the court and the forest, and there are fairies and there's magic, and there's a certain number of characters and I imagine those characters will need different costumes. There may be special effects, I'm gonna need a certain number of actors and, by the way, I'll

probably need to bring some of those actors from out of town, so I'll need to house them and travel them. So there are all these moving parts that, if you give me just the title of a play and let me read the script, I can make certain assumptions about what that might reasonably cost, what might be a realistic budget. And then on top of that, if you give me a director, which is sort of the chief artist in any of these projects, I might say, "Oh, that director likes really lavish sets," or I might say, "Oh, that director likes things very minimalist and spare." So maybe they could do a set with a little less money.

**09:00 KL:** So how do you, from where you're sitting, address risk or expect others to address risk?

**09:03 DV:** For me, and for my theater, when I see a design, I have to evaluate whether... With the support of my project managers, we have to evaluate whether we can complete this design within the resources given, time, staff, money etcetera, etcetera. The question is, how much do you reach? I mean, it is relatively easy to define in any given situation what is easily achievable. It's easy to say, "Yeah, we can get that done, that's a no brainer." But why leave some resources on the table at the end of the day? If you have a bucket of resources, the goal is to use them to their fullest extent without overreaching.

**09:54 KL:** Right. Do you document the key things you're looking for or the things that could go wrong? Or do you guys not process...

**10:00 DV:** Yes. I think there's a standard that we know that the performance proceeds, that all of the elements are there, that there's not, for example, like not only are all the costumes are there but all the trim and all the detail is in the paint. And the actors know all their lines, and know all their blocking and beyond that, they're engaged, they're emotional, they're creating a reality on stage for the audience. So those are all the standards, but what if the initial set design has a lot of automation in it? My technical director may look at that and say, "Well, I feel like maybe we can get this done." We might still be working on it through previews, and I don't know if the first couple of previews might be a little bumpy. And I know here at this theater that's not going to be acceptable. So I don't want him to cut from say, 20 to 5, but I wanna find that sweet spot which is, are we doing as much as we can, but not overreaching?

**11:02 KL:** And that's going into the planning stage, so you're mitigating risk on the front end. You're highlighting that as a potential problem and getting ahead of it?

**11:08 DV:** Absolutely.

[music]

**11:12 DV:** The question that's actually fascinating to me is that at one time all managers came up through the ranks. Managers, project managers, executives, etcetera. You would meet an executive director who started as an assistant box office manager someplace and grew, and grew, and grew, and grew. And because of their interests and predilections and particular talents were given chances to step up, and step ups, and step up. And that's a very valuable journey to have had as a manager, obviously. On the other hand, a lot of these managers and executives got their training ad hoc, in terms of the higher function and stuff. For example, my Master's in Stage Management had a very basic... I had one class in contract law, business law, actually, it wasn't even contract law, and I had one class in basic accounting. And now I manage a budget that represents half of this organization's

expenses.

**12:20 KL:** Wow.

**12:20 DV:** That's the extent of my formal training. So somewhere along the way, I had to pick all that up. Now, there are programs where you can go and get an MFA in Production Management, you can get an MFA in Artistic Management and Administration. And so those people come out with basic accounting and business skills and all of the things that you would expect an MBA to have.

**12:46 KL:** So what would you like going forward?

**12:47 DV:** I don't want people who have no idea of the jobs below them, of what they do. I also don't want people to become managers without some basic business training. I think the best of both worlds that I see are the people who start to work their way up, and then go, "You know what? I need some more formal education." And they go back to school and then they come out.

**13:09 KL:** Right. Go back and forth.

**13:11 DV:** Yeah.

**13:11 KL:** Well, that may be what the certification might be helpful for some. That's what we found for some practitioners. The ability to say, "I've met a standard of how I practice this craft," or this art, right? In the case of project management.

**13:23 DV:** For me, the idea of project management as a skill set, it's something I've only heard of in the past five to 10 years. It's kind of fun to realize that something that you've just learned to do actually fits into a skill set that extends beyond your own industry.

[music]

**13:45 KL:** Our second milestone emphasizes early expectation setting as a means of bounding scope and reducing risk. The project output is not just an event, but the stuff of dreams for many. Lean in and listen to the tale of the wedding planner.

**14:00 Tara Melvin:** It's basically getting what they want, so that whenever they step in that room, they're saying, "This is what I wanted. This is what I have been dreaming of."

**14:13 KL:** What if your role was dream maker, or perhaps dream keeper? Managing a project where stakeholders' expectations are everything when considering the success of the project. Where you don't just plan and execute, but shape the experience inside the budget you're handed and make dreams become valuable memories. The project: A wedding. The project manager: The wedding planner.

**14:37 KL:** Today we discuss the ultimate personal project, the wedding, with wedding planner Tara Melvin of Perfect Planning and the President of the Association of Wedding Professionals.

**14:47 KL:** I would imagine that stakeholders are an important aspect of any client-based delivery

but, certainly, in a wedding.

**14:53 TM:** Well, with a wedding, you have a lot of stakeholders. At the top of that tier is the client that you're working for, because they're the major stakeholder, they're the people that you have to please. They're the ones that you have to provide that end result to.

**15:06 KL:** Who is that, typically? Is it usually the bride, always the bride, not always the bride?

**15:10 TM:** It could vary. Most of my clients, they're in the 32 to 40 range, so they're more mature, and they're paying for their weddings themselves. They're not getting any help. So the bride and the groom are very, very heavily involved. The other stakeholders are the individual vendors that I'm working with. Because, as we work as a team together, we all have to produce a phenomenal result. And that result, for us, leads to getting the awards that some of the wedding industry people get, or being recognized in Washingtonian Magazine or The Knot for producing successful events. So the other industry professionals that are helping you put this event together, they're your stakeholders also.

[music]

**16:00 KL:** Do you believe that you see a wedding from the beginning to the end in the same way that perhaps the bride does? Is the scope the same for the two of you?

**16:08 TM:** No. I would say it's definitely different. They have an idea of what they want. Colors, whether they want it rustic, classic. But beyond that point, "How do I get it there? How do I make this look classic? Or how do I make this look like a Tiffany-themed wedding? Tara, I need your help to get me there." Guest lists, they will start out...

**16:31 KL:** Time of the year.

**16:32 TM:** Time of the year, they already know that. Do they wanna venue where they can have ceremony and reception all in one place? Or are we traveling?

**16:39 KL:** So they typically know that when they come in.

**16:41 TM:** They know that, yes.

**16:41 KL:** So you interview them on the front end to get all of that out of them?

**16:43 TM:** Oh, yes, definitely.

**16:44 KL:** So they have those kinds of ideas coming to you and then you have to think about it sounds like the method of doing all of this.

**16:50 TM:** Yes. So if they start talking about, "This is what I envision for a venue." My head is already spinning off while they're talking, "Oh, this venue, that venue." And then I start talking about their budget. We forgot about that, budget.

**17:02 KL:** Let's talk about that.

[laughter]

**17:04 TM:** Budget, yeah. So is this particular venue gonna work for them? Does this particular photographer match my client's character? And then, also as far as color, I have three big binders like this filled with fabrics. And so I'm thinking, "Oh, this fabric would work." It's chaos in the brain, but it's organized chaos. After I've done the detailed consultation with the client, then that's when I present them with the storyboard.

**17:34 KL:** You storyboard this?

**17:35 TM:** Yes. I email it to them. Give them a vision as far as where I'm trying to go based on what they've told me, and it's up to them to say, "Yes, this is it," or, "You kind of got it, but I want you to kind of move this way." And so we'll have a consult after that to make sure that we're all on the same page, and once they agree to that storyboard, then that's when I start moving and working.

**17:57 KL:** That sounds like what we would call a "charter." We now have agreed with the key stakeholder the kind of what we're really actually doing, what the main themes are, what's gonna be involved, the basic budget and the schedule, right?

**18:08 TM:** Right.

**18:08 KL:** So we all know these are the parts. Now go put it all together and make it happen.

**18:11 TM:** That is correct.

**18:12 KL:** In your mind, what are the biggest risks as you're in the planning phase? How do you handle risk? Do you bother to think about it? Is it automatic in your mind?

**18:20 TM:** Once I come up with that design scheme, I'm always going back to my rental company. I get that full linen, I put it on a table. I do a complete table setting, just so I can make sure that this is gonna turn out the way I would like for it to turn out.

**18:34 KL:** You prototype it?

[chuckle]

**18:35 TM:** Yes. So then, when it gets closer to the wedding, like three months out, I do that same identical thing with the client. And I actually work with the florist. So the centerpiece is there, the florist comes to the meeting, and we all talk about this display, what is going on here. So if she says, "All of my colors are pink and purple," so the florist brings the flowers, she says, "Too much purple. Kinda back out on the purple, more pink." So that is the time when we take care of all of that. I will say 50% of my clients, they change something about their decor when it gets closer to the wedding.

**19:12 KL:** Wow! How many times do they get an interaction like that?

**19:15 TM:** Just that. Because you don't wanna overwhelm them too much, and then you don't wanna open up the floodgates [chuckle] either.

**19:22 KL:** Of change?

**19:23 TM:** Of change. [chuckle] But they feel pretty comfortable with that.

**19:27 KL:** What else do you have to check in any way?

**19:28 TM:** I provide all of my vendors with a timeline, so they know exactly what is going on step by step. My catering staff that's working the event, the photographer, the videographer, the DJ, they get the complete timeline, because they're basically there from start to finish. With the photographer, it starts with them as far as, "When is my bride getting ready?" Because she wants getting ready photos. We do run behind, but do we ever go over the time? No.

[music]

**20:00 TM:** Constant communication is so key on the day of the wedding. We walk around with radios, that makes it easy, so if I need for them to go check in with the bride, somebody is going to check in with the bride, if I can't do that. And then, most of the time, the photographers, because they're in the room with her, taking all those photos, they communicate with me via text. So if we do go over time then I have to communicate back to my staff, "We're gonna be 15 minutes behind, 20 minutes behind. Please alert the catering staff so that the food is not coming out."

**20:28 KL:** So that's real time for you?

**20:29 TM:** Yes.

**20:29 KL:** You're very much moving into very hands-on real time schedule control?

**20:32 TM:** Yes.

**20:33 KL:** Do you have a written plan or a written schedule for each wedding that you're working with, where everyone is on a timeline? Is that actual physical thing you deal with?

**20:40 TM:** Yes.

**20:41 KL:** Do you use software for that? Do you use a big white board? What do you do? How do you handle that?

**20:45 TM:** Well, I have co-created it myself, and I call it the client workbook. And basically it's an Excel file that I have created over the years and there's different tabs at the bottom. And I carry on... One of those tabs is a to-do list. And we go by that to-do list, and I even designate. "Is this is a Tara responsibility or a bride and groom responsibility?" And I forward that to them, and all I want them to look at is the bride and groom responsibility. Anything that's related to Tara, then don't worry about it.

**21:15 KL:** That's an accountability matrix. We have those too. Those are wonderful. You're a project manager, for sure.



[music]

**21:25 KL:** A lot of the parts of going to a wedding are actually separate industries that have come together in a coordination with partners. It sounds like one of the valuable skills you're bringing to the table is the decorative arts and interior design as an element of creativity that you're bringing to the table.

**21:40 TM:** Yes, I think that's where my expertise comes in, and then when it comes to the flowers, that has been a learning process, learning flowers, learning colors. Are they in season at this time? And that's being educated by my wedding professional peers. So, with any planner, even though you know your field, I think you need to learn, not be the know-it-all of everybody else's profession, but know something of their profession, so that you can be more knowledgeable in front of your client.

**22:10 KL:** When we watch this on TV and we see all these shows, both in the movies and in sitcoms, and in fact, now reality shows, a lot of the stakeholders are saying, "No, not that, now this." How much of that really goes on for you as you've moved through this process?

**22:26 TM:** Do not watch reality TV.

**22:29 KL:** It's not that real?

**22:30 TM:** It's not that real. My biggest challenge on the day of the wedding are their guests. Their guests...

**22:36 KL:** Ah! The new stakeholders. [chuckle]

**22:39 TM:** Yes. So they want the room to be the right temperature, they want the right type of food, they wanna sit in the correct position not knowing that, the bride and groom positioned you here.

**22:51 KL:** So you're at the final moments of this big project and that's when you get a whole list of your biggest challenges?

**22:57 TM:** Yes.

**22:57 KL:** So when you look at this from the big picture, where does it go wrong, that actually is a problem?

**23:04 TM:** I would say the going wrong part is when you're trying to convince your client, which is your major stakeholder, when it comes to the budget part, as far as them knowing what you're really wanting, you can't get it for that price. So it's kind of a little tug of war there.

**23:25 KL:** We call it expectations setting, because that's really your measure at the end basically.

**23:28 TM:** Right. So they have caviar dreams, but we have a beer budget. And you're just trying to make them realize, "We can't really get that, but let's talk about some alternatives to get you that way." When it comes down to it, it's basically getting what they want, so that whenever they step in that room, they're saying, "This is what I wanted. This is what I have been dreaming of."

**23:55 KL:** So is that when you get your happy moment, or is it...

**23:57 TM:** Yes, and I actually do a happy dance. [chuckle]

**24:00 KL:** Oh, you do a happy dance?

[laughter]

**24:00 KL:** Okay, when they do it, when it works.

**24:02 TM:** Yes on the day of the wedding when I get that "Okay" statement from them, yeah.

[music]

**24:11 KL:** What are some of the key skills someone needs to be an effective wedding planner?

**24:15 TM:** Definitely an excellent communicator, a great listener. Organization is key.

**24:22 KL:** In what way?

**24:23 TM:** It's knowing when certain things need to be implemented. Handling so many clients at one time, you have to be able to think straight, know how to process all of this in your brain. Again, being that project manager and being someone that is not afraid to step outside of the box, because...

**24:42 KL:** Where does that come from?

**24:44 TM:** If your bride wants something and it's not gonna fit within their budget, you need to be clever enough to figure out how to make it work or to communicate with them the reasons why it's not gonna work. You definitely have to be able to think quickly and move quickly and if something happens you need to quickly start thinking of alternative ways or how this process is still gonna move without interrupting the flow of your client's event. It's a lot of hard work, and I think that anyone trying to get into this industry that before you open up your own business, maybe tag along with a wedding planner for a day. Especially on the day of the event, because I'm on my feet for 14 hours or more that day, from the time I wake up in the morning, which is usually at 06:00 AM, I am going over my to do list, connecting with my teams, sending them text messages.

**25:38 KL:** You become a micromanager, for sure.

**25:39 TM:** Yes. And then at the end of the night when things are all over, I probably get home two three hours later after the event is over with. So it's a very, very long and tedious day. Is it fun? Yes, it is. But just know that fun means hard work.

[music]

**26:03 KL:** The wedding has me thinking "wine". Sun, wind and rain confound the best-laid plans for the winemaker and the capricious tastes of the customer are a whole other problem. But PM-

type of activities aid these skilled professionals. We sip our way into milestone three, the vintner's tale.

**26:26 KL:** So I'm standing here at Keswick Vineyards in Central Virginia on a 30 degree winter day in January. Sky is blue, air is clear, I wanted to come and look at grapes, but there aren't any grapes this time of the year.

[music]

**26:43 Steven Barnard:** The only consistency is that next year is gonna be different. So how do we create a product that in its very core the quality is determined by rainfall, sunshine, growing season, growing degree days?

**26:56 KL:** Wine, it starts with the vines and the work with the vines starts during these cold January days. Dictated by temperature, the rain and the sun, the real schedule of getting grapes to glass is not so much planned, as much as it is followed. The schedule is seasonal, so the project manager in us is left to ask, "What's left? What are the issues of scope, team management, quality, stakeholder management? Who manages all of this?" Behold the vintner as project manager. Steven Barnard is the winemaker and vineyard manager at Keswick Vineyards in Central Virginia and a very busy man. But the chilled January with buds not nearly ready to break allowed him time for a leisurely discussion.

**27:40 SB:** So while that there's no grapes this time of year, of course there's wine in bottles and the tasting room is an active and vibrant place.

**27:48 KL:** From the tasting room Steven took me towards his office, first through a large, cool, concrete-floored room filled with big oak barrels and even bigger steel tanks.

**27:58 SB:** The tanks have wines in them, tank one, three, four and the small tank are all full to the brim with wine. The majority of them hold around four, two to five tons, anywhere from 8,000 to 10,000 pounds. Every barrel has wine in it, various varieties and the oak, we've got French oak, American oak, Hungarian oak of various sizes and various ages as well. This is where we take the grape that was grown from the vineyard and this is where we make it and turn it into wine. Some hold wine that'll be in there for two years, some will get bottled in the next couple of months. It all depends on the growing season, the intangibles that you can't control. The weather, the rain, the sunshine, all of that.

**28:35 KL:** So it's on a schedule but you can't control all the inputs of the schedule?

**28:38 SB:** Winemakers wanna control as much as they possibly can, but all the important things you have no control over, so it's the most frustrating... It's part science, part luck, part growing, part just artistic. And we want you to smell where the grape comes from, what the vineyard is, we don't want you to smell and taste the hand of the winemaker. We always say, "Best fruit makes best wines." Our job is not to mess it up.

**29:00 KL:** Well, let's go talk about some about your background and the vineyard and more on the process.

[music]

**29:16 KL:** Tell us how you got here, so a quick background.

**29:18 SB:** I believe it was a 737 plane, 2002 from Cape Town, South Africa, born and raised. And after studying winemaking in South Africa, I really wanted to travel the world at that point, I was advised that maybe I need to look at Virginia. It was, I would say, an unknown entity at that point, it was a very small wine industry and then also Keswick was a brand new winery, they had never made wines before, 2002 was their first vintage. So I really could come into a place that wasn't restrictive in terms of, "What we've done many, many years and this is the style of wine that we make". It was very much an open or a clear palette, so to speak. You could do whatever you wanted to, you could learn, you could experiment.

**29:58 KL:** So what do you do?

**30:00 SB:** Oh, golly.

**30:00 KL:** What's the scope of your work?

**30:01 SB:** Sure. The scope of the work is to grow the fruit and make the wine. So anything from vineyard to bottle is primarily what I do, but there's a little bit more involved. Obviously, you have to promote the wine, and meet with the customers, and learn what people are drinking and look at trends and stuff like that, and create a product that is not only reflective of what we wanna do, but a product that is wanted by the customers and who will pay the kind of money that we ask for it. So, if you don't like the wine, that's my fault, and if you don't like the look of the vineyard, that's my fault too.

[chuckle]

**30:29 KL:** So tell me about the size and scope or scale of this environment where we're sitting now at Keswick.

**30:37 SB:** I would say we're a good mid-level range winery. Currently we're 43 acres of vines, and we produce anywhere from 4,500 to 5,500 cases a year. In 2000 the vines were planted, so when I got here the vineyards were established. The planting itself was done by a crew that put in the trellising system, and the drip irrigation and all the vines and I've sort of continued that work and hopefully in 20, 30, 40, 50 years time, someone else will be doing that.

[music]

**31:13 KL:** Give me a snapshot of your year.

**31:15 SB:** It's winter, the vines are dormant, at this point they've got to get pruned. We have to be done by beginning of April. So we do that in the wintertime, the vine then comes out of dormancy and the growing season starts. So we have bud break, where the buds open, and...

**31:30 KL:** When does that happen, the bud break?

**31:32 SB:** Bud break is around April 10th for us. Northern Virginia is a little bit...

**31:34 KL:** Wow, very specific.

**31:35 SB:** Yep. Give or take. Could be a couple of days 'fore, couple of days after. And then from April through August you have the growing season. So, it grows the fruit, the fruit gets bigger, the fruit ripens. And then in August we start the harvesting, so that fruit then gets taken off the vine, and then from August, September, October, you're making the wine. You're actually physically taking that grape, you're process is that you're taking grape juice and you're fermenting it into wine, and you're manipulating the product. You've still got some barreling work to do, the wines need to be barreled down. You get finished in end of November, give or take, you take a little bit of a vacation. We go down to Disney World, and you come back and you start pruning the vineyard again.

**32:16 KL:** You've actually bottled by the end of that period?

**32:17 SB:** We haven't at this point.

**32:18 KL:** When you decide to go ahead to bottle it.

**32:20 SB:** Yeah. So you do multiple bottlings throughout the year, based on when the wine's ready or the needs of the tasting or the needs of the business.

[music]

**32:35 SB:** Behind every winemaker's a very good team. Whether it's an assistant winemaker or cellar workers or vineyard workers. A winemaker doesn't do everything on his own, so the stronger the team, and the more educated the team, and the more philosophically like-minded they are, and the more technical they become, the better it is. I have two main people who work with me. They work very closely with me in the vineyard and the winery. It's very much a team effort. Firstly, you have to teach them about what we're trying to do, and you have to sell them on the whole philosophical approach to making wine.

**33:06 KL:** There's a mission?

**33:07 SB:** Absolutely. We do the pruning together, we work very closely with each other...

**33:11 KL:** You're out with them?

**33:11 SB:** We do a lot of the production. Oh, yeah. I'm out in the vineyard as well. I appreciate the fact that I'm out there and I can touch the vines and I know the vineyards and it forces me to get out there and work. And it makes you a better winemaker when you know the vineyard.

[music]

**33:29 KL:** So from a project management perspective, you just have described kind of what we would call the scope. You grow a grape and it ends up in a bottle somewhere that gets sold. What's the biggest thing that you wrestle with from the position you sit in? Is it more around the quality, the schedule?

**33:45 SB:** Well, from a winemaker point of view, it's definitely the quality, and I would take it a step further and say it's consistent quality. They say, "The only consistency is that next year's gonna be different."

[chuckle]

**33:56 SB:** So, how do we create a product, how do we create a consistent quality of a consistent style year in year out, despite those things we cannot control?

**34:05 KL:** You mentioned earlier that all the important things are the ones you can't actually control.

**34:08 SB:** Sure. Yeah.

**34:09 KL:** So which ones are those? What is it?

**34:11 SB:** Rainfall.

**34:12 KL:** Rainfall?

**34:12 SB:** Sunshine.

**34:13 KL:** How much and when?

**34:14 SB:** Yeah, when, the timing of which. I'd love to get rainfall earlier in the year, and nothing at the end of the year. I'd love to get a lot of growing degree days. I'd love to have cooler evenings. For a consumer it's very hard to drink a wine in one year, fall in love with it and go back and then find out that next year's wine is very different. The trick then is to sell that and to get people to buy into the philosophy of... The wines will be different, not because of we're a manufacturer. We're not making keyboards and every keyboard's the same. We're making wine, and if our philosophy is we focus on the vineyards, so we have to do very little in the winery, those wines are gonna be different and it's a chance to educate.

**34:54 KL:** Stakeholder management is actually getting what you're producing in the wine with what they're expectation is. Is kinda how we view it.

**35:00 SB:** Without a doubt.

**35:00 KL:** Is that consistent for you?

**35:01 SB:** Yeah. You can look at trends, you can look at markets. You've got such a demographic. Think of the age demographic, you've got 21-year-olds all the way through 60-year-olds. You've got people from the East Coast to the West Coast. You've got international people coming in. So people come in with a variety of tastes. It's kinda like music. You've got people who love classical and hip hop or rap and opera, or whatever. So, education's important, you can't assume they know what you know. And, I've learnt that people see wines in a different way than I do. So it's our job not only to make wines, but to sell our wines and sell the philosophy, that's where our wine club is such an

important part of our business, because the wine club members, they buy into what we're trying to do.

**35:42 KL:** Do you feel it's a moving target, then? The quality aspect or the ability to meet those expectations?

**35:47 SB:** Absolutely. Absolutely. Which is one of the challenges. You have the things you can't control in the growing season, the actual quality of the fruit. But then you also have the changing demographic. You have people's tastes changing.

[music]

**36:04 KL:** You're a subject to a lot of risk, I think. How do you feel about risk?

**36:07 SB:** I'm very conservative in terms of risk, and that's why I work for someone who owns a winery, versus of owning own winery. I think that experience comes back into it. You gotta do your due diligence. There's certain sort of plots of land, whether it's elevation, or slopes or soils, that would work for certain varietals. In Virginia speaking, we have a fairly short growing season, so you might want to put varietals in that bud late, that are not as susceptible to frost, using one example. We also have a pretty humid growing season, so you might wanna grow thick-skinned varietals, not tightly clustered. That's why you don't see a lot of pinot noir or sauvignon blanc or riesling, because they're very prone to rot. So you plant different root stocks of varietals that are less frost-susceptible, or produce a second crop, or produce a lot of fruit. We know that every now and again there's gonna be environmental challenges that are not gonna conform with what we would like. In those years, you need to have a plan, whether it's picking parameters, or additives, or what we can do, we've got plan A, this is what we wanna do under these circumstances. We definitely have a plan B and you gotta think on your feet, because something always breaks, something always goes wrong.

[chuckle]

**37:17 SB:** You can get a lot of rain and nothing can ripen and you're dealing with rots and you're dealing with fruit that's just, for a lack of a better term, crappy. And how do you make a quality wine from crappy fruit? That's where the winemaker's toolbox comes in. There's always products you can use, there's blending options, adding yeast or putting it in a barrel, but certainly the best winemakers in a weak year, will make the best wines, that's how you can distinguish a really good winemaker, who knows the vineyard, who knows how to make wine.

**37:44 KL:** Can things go wrong in the manufacturing part of it?

**37:46 SB:** Oh, absolutely, yeah. Winery equipment only breaks when you need it. And the press only breaks when it's filled with five tons of fruit, which is what happened on me. And you can rant and rave and you scream and shout, but you've gotta know how to deal with it and when to deal with it. And that I think is experience. I've had kids who've come in that are highly, highly taught, highly educated and you throw a practical issue at them and they're dead in the water. So, you can't negate having the technical expertise, but I think there's no substitute for experience as well, which is very important.

**38:19 KL:** Do you have a continuous education that happens for you? Besides experience. For example, do you go to additional training of any sort?

**38:28 SB:** I still go to technical meetings. I stay on top of research and development. You gotta keep learning, you gotta keep tasting, you gotta stay current, and then you've gotta be true to what you do and what you do well.

[music]

**38:45 KL:** Racing to the big night. Planning from up to two years ahead of time, candidates for political office rely on the skills of professional managers to find the funding, spend the money, and get the electorate just enough engaged to vote the right way. The final milestone of this narrative, the story of the campaign manager as project manager.

**39:05 Tom Bowen:** Most people vote the way I'm gonna buy a toaster, they don't think about it very much, they don't do it very often.

**39:10 KL:** Imagine selling to a customer like that, with two years leading up to the purchase.

**39:15 TB:** You just have one day to get everybody to go out there and express a preference that almost 99% of the time will not make a difference.

**39:25 KL:** We're talking politicians and the campaign managers that get them through election night.

**39:30 TB:** They are the product you're selling to the voters, their vision, their background, their hopes and dreams.

**39:36 KL:** Tom Bowen is a Political Communications and Management Professional. He was a Staff Assistant for Senator Barbara Boxer, a reporter for The National Journal, with senior hotline editor Chuck Todd, a press aide to then State Senator Barack Obama, and most recently the deputy campaign manager for Chicago Mayor Rahm Emanuel. Tom has managed six political campaigns and is the principal of New Chicago Consulting, which specializes in management and communications for political and non-profit organizations. We had an in-depth Skype conversation about this intensely personal, yet very public project called, "Getting Your Candidate Elected."

**40:14 TB:** Democracy is largely an exercise in social engagement and expressing values, and you have to really understand what you're trying to sell people on, which is to go out there and speak out that they want a certain thing to be done. It is like running a business, but it has a finite end and a specific purpose, so it is much more accurate to think of it as a very long-term and very intense project.

**40:43 KL:** I think the scope is pretty clear, "Get me elected". How do you start approaching the schedule and looking at the control of the interdependencies of the activities that you have to deal with?

**40:55 TB:** There's several things to first educate the candidate about. I think people that do my job, that do it responsibly, talk about the risks of engaging in the public sphere. There's a tremendous amount of scrutiny. There are interests that you may be challenging that are powerful. So when you



seek office, you are, in theory here, taking this opportunity away from somebody else and someone will fight for it. So your competition is something I always try and get folks to consider. The very important schedule items are number one; the rules of accessing the ballot. There was a story about Mayor Rahm Emanuel not being eligible for the ballot because he was serving in Washington, DC as the President's Chief of Staff, even though he maintained a home in Chicago that had renters in it.

**41:52 TB:** The very important next item is to build a strong team. Campaigns are not won or lost by single people. They are won or lost by teams and they are led by, number one; the candidate themselves. Campaigns tend to reflect their candidates and then the manager that is given responsibility for running the campaign.

[music]

**42:21 TB:** The folks that make up teams and campaigns tend to be development or fundraising, media consultants and the various different types of media consultants, digital media, television or traditional media, radio. Other members of the team are what political people call "field". You need people on the ground in communities organizing those communities for the purpose of electing that candidate.

[music]

**43:00 TB:** And then the last part is what we have focused a lot more on in politics in the last 10 years because of the growth of spending related to it. We consider it operations, but it's your real estate brokers, your accountants, your legal teams that handle things like human relations, staff agreements, confidentiality agreements. I have seen disparagement clauses enter political contracts for the first time.

**43:31 KL:** That's about the kiss and tell type of things?

**43:35 TB:** I've seen agreements that say that you will never write a book about your experience.

[music]

**43:43 KL:** How far out do you start as the campaign manager? When would they get that call to start educating the client and to start building that team?

**43:51 TB:** People start thinking about these races many, many years in advance, but very seldomly do you see anybody acting beyond a two-year time line before an election.

**44:03 KL:** Who are your stakeholders? Who actually are you trying to please or accommodate?

**44:10 TB:** The candidate is the ultimate boss, they are the decision makers, it is their name on the ballot. And also there are folks that we'll call a kitchen cabinet that are part of any candidate's life, a spouse, a sibling, a parent or a business colleague. There are competing interests, and I think good candidates tend to have folks that keep them grounded who are in real life, and then also have folks firmly in the what you need to do in order to be elected camp, which is a manager, staffers, consultants, donors, special interest groups like business groups or labor groups. All of these different people have a say, if you will, in how a plan will develop and how it's executed.

[music]

**45:08 TB:** A typical campaign budget is about 80% media, they gobble up the largest piece of that pie. They are often important voices in what the campaign plan is going to say...

**45:25 KL:** Let me make sure I understood that. Because media takes 80% of the budget, the media specialists tend to be a key sponsor in what's happening for our plan design or campaign manager?

**45:34 TB:** Yes absolutely, since so much money is being spent there, well, of course that media consultant might have an important voice on the team. And I think good managers balance those concerns out with their own perspective that they are trying to accomplish.

**45:52 KL:** Is your candidate, like you said, your boss, your sponsor, like the person that you're trying to just satisfy, or are they the product?

**46:02 TB:** They're actually all of it. From the manager standpoint, they are your sponsor. At the same time, they are also the product you're selling to the voters, their vision, their background, their hopes and dreams.

[music]

**46:18 KL:** So from your perspective as being the campaign manager, are you more coordinating some of these key stakeholders and team members, or are you actually getting their input and then you're actually designing what they need to do? How much are you a project coordinator versus a project manager in that context?

**46:35 TB:** You really do coordinate the members of the team to do what they do best. Obviously, a manager's best quality is leading a team, hiring a team, motivating a team.

[music]

**46:54 KL:** So from a campaign manager's perspective, where is risk?

**47:01 TB:** There are tons of risks. Is the development or fundraising process going well? Are you meeting your targets and goals? Are you speaking to enough voters with your staff? Is your candidate prepared to answer the questions? The average person who runs for federal office has very, very limited experience in dealing with foreign affairs, and a lot of voters don't tend to make decisions that way. But if you badly flub a question about foreign affairs, the conclusion the voter will draw is not that you are unaware of the ruler of Saudi Arabia, it's that you're unprepared to do the job, "And I do not want you voting on sending my sons or daughters to war if you're not prepared for that vote." I see this happen all the time, often there are many advisors and many team members and they don't have the perspective you do, and they may think of something as extremely urgent to tell the candidate, but you have to be able to maybe stop that from happening that day, because some people, whoever tells them something last, that is what they're going to retain as far as how an argument's gonna be made.

[chuckle]

**48:10 TB:** And if you were walking into a television debate that night, someone may just say, "Hey, don't forget to mention that," and that's the last thing they hear and that's not part of the plan. There's nothing you can do, so you can't educate every family member to be on the plan for the debate schedule, but you have to keep the candidate away from maybe that uncle that gives advice when they're not cognizant of kind of how elections work. I think any good manager in politics should have control of the checkbook and that is a very powerful way to settle differences, is the decision is yours and you spend the money. I think there's also extremely good value in having an audit-type system, which is usually a campaign treasurer, so that someone is watching over you.

[music]

**49:07 KL:** So all projects have to watch how fast they burn through the money. I assume a couple of things, that finances are particularly tricky in this case, that they're very exposed?

**49:17 TB:** Let me start with the burn rate, which this is an extremely unique thing, an extremely nerve-racking thing, and something that probably most folks listening to this haven't experienced before. Your burn rate gets extremely high the closer you get to the election, and it essentially goes to 100%. Your goal is to spend every dime you have. The lifecycle burn rate here is to essentially keep it as low as humanly possible, to really live on shoe strings and to not make some sort of mistake on the spending side that creates difficulty in executing your plan. The other thing I'd like to point out about this is your revenue essentially comes from the generosity of politically savvy and ideological people, and there's about 1% of the country that give in political campaigns. So those candidates spend 80% to 90% of their time not actually talking to voters or learning about issues, they spend it fund-raising.

[music]

**50:31 KL:** Your budget is actually part of the potential story here, right?

**50:35 TB:** Yes.

**50:35 KL:** They have to show that they're well-funded and you also, of course, can't have some scandal, if you will.

**50:40 TB:** Well, and one thing we haven't talked a lot about is there is also somebody out there who wants this same office, who is picking at everything you do and trying to create a negative story about it. And budgeting is a frequent tactic. It is a well-known technique to review the campaign finance filings of a candidate. That's a potential area of attack.

[music]

**51:13 KL:** So, it's election night. You've spent the money right up to the last minute. The project's about to terminate, you're about to get the answer whether or not you met the scope requirements, which was produce a winning candidate. So how much are you still managing through election night and into the next day? When does the project really end?

**51:32 TB:** Election day is always fairly easy, because everything's done. You don't have anything to

do. All the wheels are already set in motion.

**51:43 KL:** Well, so when did you get done, the day before, the week before?

**51:45 TB:** Yeah, usually like the couple days beforehand. Election day, you don't have actually a lot to do. It's extremely nerve-racking because you've spent 18 months to two years, and if you've been working with somebody for a very long time, maybe years and years for them to reach this new pinnacle, is exhilarating if you've been successful. It's powerful even when you lose in how much pain it can be. But the next day you have to shut down the campaign, win or lose. Campaigns are legal structures, they're non-profit corporations. So you have work to do with the IRS and with your state and local government, you have rent to pay, you have phones that have been activated or deactivated. You usually hold some resources back from the end just for close-down costs, but measuring that, 'cause you really, once a campaign is over, no one else is gonna give you any money if you've lost, you have to be pretty efficient in how quickly you stop spending money. And you better hope you don't have a recount. That could be a whole new challenge. You'll have a sense of what's going on, whether you're close to winning, you're not going to win, or stuff like that. So that will help you budget better. But usually within the first seven to 30 days of the campaign's ending from election day, that's the time period where you essentially shut everything down.

[music]

**53:18 KL:** How much of this is documented? Your schedule, key milestones, key expenditure rates and targets for expenditures? Is this documented ahead of time or is it very organic?

**53:29 TB:** It is much more documented now than it has ever been and every new election cycle it is becoming more documented. There is a much bigger professional industry around this now than there ever has been. There's more money in politics than there ever has been, there's more money in government relations and lobbying. 25 years ago, much more often these were personal friends or people who had local, vested interests. There is just huge networks of us now who have managed several races, work in this industry, and that's been a result of the growth of funding. In 2008, the Obama and McCain campaigns maybe spent \$300 million and \$500 million. In 2012, both the Obama and Romney campaigns spent a billion dollars. And the projection in 2016 is that both the Democratic nominee, Hillary Clinton, and whoever the Republican nominee is, will each spend \$2 billion and that there will probably be an additional \$2 billion to maybe even \$5 billion more spent by advocates of each one. But the growth is just as exponential.

**54:54 KL:** With the growth of that and the more technical management aspects, I'm wondering if it's a growth area for project managers. Do you see a role for people with that kind of training to be inside campaigns now?

**55:04 TB:** There's a saying kind of in campaigns that what you're doing here is you're building an airplane as it's getting ready to take off. It's very chaotic. So there isn't always a lot of thought around good project management, and I think people, the more they do these sorts of things and the more they are involved with maybe not working in them anymore, but advising people who are working in them going forward, there is a lot of thought around how to do this better. And managing people and organizations well, I think it's enormously important.

**55:39 KL:** And so you're off now preparing to pick up the next set of candidates, perhaps?

**55:43 TB:** I'm recruiting for the 2016 cycle, so if anyone is listening from Illinois and you're thinking of running for office, my Twitter handle is @thomascbowen, and talk to me about running.

**56:00 KL:** And we thought formal project management roles were complicated. I hope you've enjoyed these stories of some unusual business applications of project management. Special thanks for the storytelling from our guests Deborah Vandergrift, Tara Melvin, Steven Barnard, and Thomas Bowen.

**56:18 KL:** Our theme music was composed by Molly Flannery, used with permission. Post-production performed at Empowered Strategies, and technical and web support provided by Potomac Management Resources. I'm your host, Kendall Lott, and until next time, keep it in scope and get it done.

**56:33 KL:** This podcast is a Final Milestone production, distributed by PMIWDC. PMPs who have listened through this complete podcast may submit a PDU claim with the PMI CRS system by choosing the REP Chapter-sponsored PDU category, currently category A. Searching under C046, the Washington DC Chapter, and finding code PMPOV0018, entitled "PM in All the Right Places."