

63. Embry, Fretz, Handler, Harned

PMs in a Digital World

Kendall Lott: Digital Products tend to have an endless feedback loop. Feedback is immediate and constant, and that adds an interesting dimension to the development process.

Justin Handler: Technology is always evolving so we have to continue to improve our products. I think, too, user demand...I mean people voice their opinions and give you feedback and you've got to cater to that to improve.

KL: New technology demands new processes.

Abby Fretz: Any kind of new AI or augmented reality, we have to learn what that new technology implies for our process and for the products that we're building.

KL: Project parameters in a digital world are fluid and unpredictable; getting locked into an established process can be detrimental to the end result. If there is such a thing.

Patrice Embry: You can't always say at the beginning, this is how we're going to run that project. As things progress, you might realize that you need to change course a little bit. Agile doesn't always give you that opportunity, so you kind of have to wing it.

Brett Harned: You can teach anybody how to create a plan and how to estimate and what process you should use. I think it really comes down to soft skills, and that person knowing what they're there to do and being a really good communicator and trying to get the best out of the team.

KL: There we are again soft skills: always absolutely crucial. Maintaining good relationships and communicating effectively will serve you well, no matter what type of project you're managing.

(01:24) So just when you thought you'd seen it all, and understood the rules of the game, enter the world of digital projects, which of course doesn't change all the rules of project management. And yet...the speed of design change and delivery and the relationship to creativity along with new technologies suddenly creates a new focus for the PMs. Managing projects in this fast-paced, ever-changing field requires extreme flexibility if you aren't super nimble, you can stumble. And no, even Agile isn't enough to satisfy the demands of shape-shifting projects like these.

In this episode, we cover the impact of responsive design, continuous improvement and continuous feedback, and wrestling with ambiguity. The challenges aren't unique for digital PMs. The project rules don't change, but the management processes have to – from scope control which the work with sophisticated web-based products tends to proliferate, to stakeholder management, in-house versus agency stakeholders, quality, cost control, sub-contracting and the use of time-tracking, resourcing and management software tools, we find that it's the responses to these

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management processes that sets the digital PMs apart. And client education is paramount in this world, where the product cannot be touched, felt, or even seen during development.

What sets the Senior Digital PM apart is experience of course. Experience not just in design and management, but in adaptability.

PM Point of View enters the world of the digital PM. Join us for the journey.

(02:55) Announcer: 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, Kendal Lott.

KL: For my digital initiation, I traveled to Philadelphia to talk to a group of experts, all members of a digital project managers meet up group. I'll kick it off by letting them fill you in on their backgrounds.

BH: My name is Brett Harned, I'm currently the Director of Education for a product called TeamGantt. TeamGantt is a platform for managing and planning projects digitally; it's an online service. As a part of my role, I'm doing a lot of teaching, so doing live online webinars, doing recorded classes, writing articles, working with some TeamGantt customers, and that kind of thing. So all around productivity and project management.

KL: You buried the lead! You're the author of "PM for Humans."

BH: Yeah, I'm also the author of a book called "Project Management for Humans," and I run an annual event called The Digital PM Summit.

KL: The digital PM Summit. Can you attend that digitally?

BH: No, you cannot.

KL: You can't? Come on. Joke's on you.

BH: We do release videos.

KL: Patrice.

PE: I'm Patrice Embry and I am a remote Digital Project Manager that also free lances. So I work for myself, I have my own clients, that usually have end clients. But I do all digital projects, and that can be websites or apps – basically anything that happens digitally.

KL: And blogging!

PE: And blogging.

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KL: I read your interesting blog. People, you've got to read her blogs, they are very interesting. You had one that I felt was just totally misnamed. I have to tell you, because the real name should have been... "How I stopped worrying about Agile and learned to love the waterfall."

PE: Yes. Yes. (laughter)

KL: But that was really, really interesting, this question about the necessity to see the types of methodologies we really need to use at the time. And there's a lot of articles coming out about that now.

KL: So...Abby.

AF: My name is Abby Fretz. I am Director of projects at a Philadelphia-based branding and design agency, doing digital design, called Eastern Standard. I lead a team of digital project managers there. I also teach at an apprenticeship program for an organization called Louder Than Ten. It's a digital PM apprenticeship program, so teaching PMs – either people who are getting into the practice or who just kind of want a refresher – the best practices for digital project management.

KL: So this is important, audience, because you're listening in because you were trying to get your PDUs here, I think, and learn something. But for all of your friends who aren't in yet, and perhaps anyone that wants to go into the digital space themselves, there is an apprenticeship out there.

Okay, Justin...

JH: I'm Justin Handler. I'm the head of accounts at a digital product design and development agency called 03 World, which we're actually sitting in right now...

KL: Beautiful space.

JH: My role here is I oversee a team of product and project managers, I'm also heavily involved in client and account strategy as well.

(06:17) KL: When I heard digital PM, I was thinking remote...virtual...asynchronous...or a project manager who works in the digital world with someone in another country. But I think we're talking about digital products, aren't we?

JH: Correct.

KH: What is this universe of products that must be managed and brought out for agency use, for client use?

PE: I think that the two easiest things for people to understand when we're talking about digital projects are websites, how do they get made, what's on the back end of them, how do they work; and apps, phone apps. So I think those are two things that people can easily latch onto as a digital project.

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KL: Everyone's using those kinds of things...

JH: Yeah, mobile apps, desktop apps...A lot of what we build are tools that people log into and use. They have high functions, they help you...you know, like your banking apps. Those are all visual...

BH: Software as a...

JH: Software as a service, exactly. So those are the types of things that we're talking about.

KL: So how is this not software development,

JH: It more less is.

KL: Okay.

JH: Yeah.

PE: Some of it is, yeah,

KL: There's something different here though.

BH: There is. There's a marketing aspect, so in the agency space...like Abby and I used to work together...and in that agency we did a lot of website redesign and website development. So, with that would come some branding work, mostly marketing work, and less IT.

But companies like O3 World, do more kind of application development. So the way that I think about digital is a lot higher level. It's kind of like...anything that has an interface that you can interact with, right? So it could be there are companies out there that are developing the applications, that go on the front of smart refrigerators, right? You know what I...

KL: Yeah.

BH: And there's a digital PM managing that project. So it really kind of runs the gamut.

(08:13) KL: So we're talking about the management of product design, development...and projects that are themselves bits and bites.

BH: Yeah, so I think where it started was really kind of in the space that we all were in at one point, which is working in digital agencies as project managers. There was a point in time like five or six years ago, where there was nothing out there for people like us.

I found it really difficult to find things, where I felt like I could learn and grow. I did try PMI and felt like it just was not my space, and I think it was a cultural thing. So the culture inside an advertising agency or a digital agency is like much more relaxed and open, and I wouldn't say not professional,

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but maybe not as buttoned up as a lot of the folks who attend PMI.

KL: So I'm wearing a suit and nobody else is (laughter).

BH: Yes. So I think really from there, it was kind of like, How can we build a community for people who are doing a lot of the things that PMI Project Managers are doing, but kind of in a little bit of a different setting? I also think the role of a digital PM is a little bit different in that we kind of have to wear a lot of hats. Justin mentioned he does a lot of different things. That's really indicative of what a lot of project managers in the digital space do. It's account management, on top of project management and team management and lots of other things.

KL: I think a lot of it Project Managers have to do that. But you're suggesting that agency work, meaning in an agency, producing this kind of product, has a different culture.

BH: Yes, I...

KL: That requires you to perform differently?

PE: Yes. Yes. Absolutely.

KL: What do you say as a freelancer in that?

PE: Well, and I used to work for more corporations where things were much different, so I've kind of been in both spots. Agencies are much more fast-paced, they're much more on the forefront of new things that are happening. When people typically make the switch from a corporate job to an agency job, it can chew them up and spit them out if they're not used to being able to do many things at the same time, quickly. The expectations for people are different, and the way we handle ourselves and the projects that we do in our day-to-day stuff, I think is just very different.

KL: It sounds like it would be hard to follow the PMBOK® and stop and everyone do a risk register right now.

PE: Yes, absolutely.

JH: Well yeah, I think a lot of it is fast paced. I think, too, in the digital space, you get a lot of different size projects, with various stakeholders and timelines and scopes. And I think that kind of lends itself to being extremely fast-paced and wearing different hats.

AF: In addition to being fast-paced, I think one thing about the agency space, or even just digital product space in general, is that you have to be nimble in the way you approach projects, because of this variance of size and scope that you tend to come across. So we're...often I'll find that teams aren't married to a very specific process that you kind of have to match the process that you're using, for project management to the product itself.

BH: The technology aspect in innovation is a really big part of what we do, especially when you're a

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digital project manager in an agency with clients who are looking for the next best thing. So we're always kind of having to be on top of that and understand how that impacts our scopes. How that impacts the way that our teams work, what we deliver.

(11:49) JH: Yeah, so when I got into this industry, which was about 10 years ago, the first thing I did was look for books or communities out there that were talking about this, because my first role was in marketing, but really, it was digital project management and it took me about a year to realize that. So when I moved to Philly, I was looking for resources to help me expedite my learning, and I think that was around the time that Brett had started blogging about it, and I found his blog, and then the DPM Summit came about shortly after, and that was when I was kind of like, "Oh nice."

There really is a huge community around this...tons of people doing it, and also tons of people looking for opportunities to learn from each other so...

KL: Yeah, they are normal people doing their work, that are ending up doing project management.

JH: Right.

KL: And in fact I saw that on one of the interesting blogs, was the name game. It sounds like you have in this culture a history of people not knowing they're project managers, and discovering...

JH: Yeah.

KL: I looked at it as Shakespearian. What's in a name? Because I was like, apparently that's what they're really arguing about. "Am I a Producer?" "Am I Director of Development Services?" It's like, I'm a project manager.

BH: We're project managers. We add the word digital in front of it, just for like, I think the community aspect of it, but...

KL: Well you've highlighted that it's different perhaps.

PE: Yeah.

KL: Perhaps.

BH: I think...I love the way that you stated it before we started recording, which was like, it's this alternate universe. Or like a sub-culture, it's a... We're doing the same things, we're talking about the same topics with just a little bit of a different kind of spin on it.

(13:24) KL: Now you're coming out of the branding space, though more, right? The marketing and branding still?

AF: Marketing and branding. And website builds, and redesigns. So yeah, I think as a digital project

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manager you're often exposed to the full gamut of things on the web, so even if you're building a software product, or you're building a website, you have to be aware of how that website is going to be promoted, what the end user experience is going to be, and kind of be aware of the full breadth of the life cycle of this thing that you're creating on the web.

KL: Is that something that affects the project management of these products? The sense about how they're used over time? Because a lot of Project Management is, "I need to perform the scope, and produce The Thing that I was asked to develop."

JH: Yeah, a lot of times...

KL: So it looks like you're dealing with life cycle...

JH: Yeah, exactly, a lot of times the product work is more iterative, it's ongoing work. You're constantly doing things like user testing, and A B testing, to continuously improve the products, right? So that's why your phone, your apps update all the time, it's because they're working to release new features they're making improvements they're making the experience better. So...

KL: Tell them what AB Testing is.

JH: Essentially just testing two versions of a different design or a functionality to validate which works better.

KL: You mean, as a user I'm sometimes guinea pig?

JH: More or less.

KL: Yeah, okay.

JH: But yeah, you know... Product development is definitely more ongoing from that perspective. The websites can be treated the same way, and we certainly do here.

KL: I noticed your website, the different websites that are hitting around this topic, The Digital PM and others, they're littered with words and fragments of words from the Agile environment...the Agile development environment. But it's not quite Agile, that almost... You know what struck me. It's like even saying it's Agile is too structured. Like I may not need that.

PE: Yeah, I think that's something that's been a struggle for lots of people who are doing things like getting their certified Scrum master.

KL: Yeah.

PE: I have that. Sometimes it's difficult for me to figure out how I'm going to apply that to a project that I'm doing.

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KL: Why is that so?

PE: Well, because even though it's meant to be flexible...

KL: Yeah.

PE: It's still not flexible enough to really be able to handle...Like what Abby was saying. You can't always say at the beginning, this is how we're going to run that project. You could try and say, "I think we're going to run it like this." As things progress, you might realize that you need to change course a little bit. Agile doesn't always give you that opportunity. Because it's not just changing the user stories, and it's not just changing the way those are being developed. It's sometimes changing the process to do those things. So Agile doesn't always give you the right tools for that, so you kind of have to wing it.

But I think Justin, didn't you...You wrote something about using Agile in the agency space, which was definitely needed because it's a big question mark for a lot of people.

JH: Yeah, it's about some scrum principles and implementing them into our process. I think some of the challenges with doing it by the book in an agency is that because it's digital, the projects I would say are a little more...can shift a little easier than something physical, you know what I mean? So it doesn't always lend itself well to the flexibility. So you've got to take elements of the processes and make something that works for you. And that's what we've kind of done here, but to Abby's point, every project may get a slight variance of that, depending on the scope, depending on the timeline, who's involved, who's involved on the client side. All of these things factor in the process.

AF: And this is a really evolving conversation. There's a lot of terminology out there that tries to blend Agile with a more traditional Waterfall approach or just... We're trying to grasp how the really valuable principles of Agile can be applied to an agency space. So, there's Agency Agile, there's ScrumFall...all kinds of terms that people have come up with...(laughter) Agiphile...(more laughter)

(17:37) KL: Stakeholders. Stakeholder communications. How is this any different? You seem to imply, there might be some difference. Do we have different kinds of requests coming in? Is it a different kind of stakeholder/client?

BH: I'll first start by saying, I know that it's different because I run a conference where people who are in agencies versus people who work for in-house teams come to that conference and the in-house people come to me and say, "We need more programming for us, because the way that we handle our in-house clients...(first of all we don't usually call them clients, we call them stakeholders)... is different.

KL: Or bosses.

BH: Or bosses, yeah, exactly, that would be other department heads who have more control than

me, right?

KL: Right.

BH: So I think that's the key difference is that in one instance, you're dealing with an external paying client who has a very high level of expectation for your team and you and what you deliver, and the quality of that work, the timeliness of that work. Versus being in an internal situation where sometimes you're not dealing with an actual scope document, you're not dealing with an actual budget that is tangible, that you can track things back to...people are not tracking time. So the way that we're managing and looking at those projects is different in that respect. I think when it comes to communications, I personally don't think that there is a big difference. I feel like there should be one level of communication and it should be clear and concise and direct and friendly.

KL: It sounds like then, your suggestion is that the in-house faces a different organizational structure that actually changes how they communicate, and budget, and have information, which means it changes what they can track and know. I'm wondering if there's a power relationship that's also different as well.

PE: Oh yes... Yeah, actually I was thinking about that. When you're in an agency you're working on something you're like... "Oh, I hope that they like it. We need to make sure that we do a really good job on this because we want to get paid." We want to make sure that we're doing everything we can to make this client feel fantastic. Where, when I worked in-house, it was very different. Where people like the stakeholders are like, "Oh I hope the project people do this well." It was completely different, where we kind of were able to call the shots and say, "Your project will get done; yours will have to wait." Where in an agency space, you're like "Oh my god. Please give me your money, we'll do whatever we have to to kind of get your business."

(20:07) KL: How does quality control planning, planning for quality and control or managing quality...how does that change or what lessons do I have in the digital product space on this?

JH: I don't think it changes. I think maybe the processes are different. We have a QA manager and a QA engineer that are part of all of our projects and processes, and we work them in as just part of the project team, so they're consistently testing and validating and making sure that what we're putting out is going through a thorough QA process.

KL: The quest seems driven through the testing process.

JH: Yeah.

AF: And I will say too, we have the luxury, I guess it is, of a continuous improvement as opposed to some solid state product, that you put out there, and it's done. There's this concept of continuous improvement, where we're constantly testing for quality and able to do some of this AB testing that Justin referred to, and then go back and iterate on that.

KL: So let's talk about continuous improvement for a second because I think is a really important

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point. And my sense is, when I've come from more of the Project Management Institute space, we don't get exposed so much to continuous improvement, we certainly don't get trained in it. Is this because people in this space arrived from a world of continuous improvement and become project managers?

JH: I would put it as, there's a couple of things. One, technology is always evolving so we have to continue to improve our products, or else they'll just fail. If your apps doing update, they won't work with the latest iPhone or Android or whatever. So that's one thing. I think, too, user demand. I mean, people voice their opinions. They give you feedback and you've got to cater to that to improve, especially a lot of the work we do is, there's tons of analytics behind it and making sure that from a marketing standpoint, it's converting leads, and dollars, etcetera. So you have to work to always try and improve them.

KL: That's really interesting. I just thought of something there, in that in a lot of projects, you don't have a lot of customer interface during the project time. In Agile, you do. That's one of its big hooks, right? is get that customer in your meetings with you. But when you're in the apps world, almost definitionally, once you have a release, all your customers are giving you feedback in some form, through analytics at a minimum, on some level.

BH: Once it's out there, yes.

KL: Yeah, so you would have that feedback loop really fast and lots of it.

BH: Yes, but I would also add to that. And that the purpose of a lot of what we're producing or building is for it to continuously change and grow and expand over time. So it's not that we will deliver a physical product, kick it out the door and walk away. A lot of times when we're building websites or designing new websites it will come with a content management system on the backend that we will train a client in, and hand over to them. As they get in there and they start breaking things, they start changing things, they keep coming up with new ideas for how to grow it. It just produces, I guess, the desire for more continued work that brings our companies back into it. So...

KL: Yeah, it doesn't happen in buildings. We've decided to use the parking garage as a guest house...

JH: We want to add another floor. (laughter)

(23:25) KL: What does this mean for cost control? How do you guys handle cost in an environment like this?

BH: Oof! (laughter)

KL: So you get to consult, to it, Patrice, so you probably don't get victimized by it as much.

PE: Oh no, I do. Oh yeah, yeah, yeah, for sure. Yeah, because I'm contracting with the agency that's

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providing the thing to the people, right? Cost control to me, I'm thinking scope control. Because in this setting, you've paid for something that you don't really even know what it is, so you constantly have to say, but this is what it is. And we're getting more granular, this is what it is. When you start talking about something that's a little bit outside of that or we've built you something that now doesn't work because something updated...you really have to be really tight with your scope so that you can go back and say, "Now I need more money to do this thing." Because almost no agency is going to say, "We're going to pay this much money. You're guaranteed updates for the rest of your life." That's never going to happen it. So cost control is really scope control.

KL: Which is interesting, because scope control... (I'll get in trouble with all the Agilistas.) But one of the advantages of Agile, is that the scope in a sense can shift a bit. Right? You develop it as you move along. You ping it, you check it a lot. It's a very different type of thing. And you're actually suggesting that, actually, that made me one of your bigger problems is the scope control.

PE: Yeah, yeah, for sure. Because even though, Agency Agile, you're trying to use those principles, at the same time you still have a finite amount of money. So it's not like you can say we're going to take this and we're going to do as much as we can until this point, and I know what the fixed cost is and then we can kind of do something after that. You have a pretty much a fixed cost. Even people that say that they're time and materials, pretty much have a fixed cost. Because that's what they've agreed to, so you can try to iterate and stuff, but you're still kind of hamstrung by that fixed cost. So you always have to work with the scope so that you can still stay within that.

(25:38) KL: So you're tracking as you move along your cost? Very tight?

PE: Every week, sometimes every day.

KL: I'm seeing some nods over here on my right. Abby?

AF: And there's another layer in there that really calls on our skills as digital project managers, for tracking, which is you can...Scope does need to change sometimes. As you go along in a project you discover that some A needs to really be B. And so, you can still make those changes, but you still have to be very aware of what each of those costs are so that you can know when to swap something out, or when something still fits within a budget, but meets the client's needs. And it's a fine art form.

KL: Are you doing some sort of unit pricing, or modular pricing? Or costing I should say.

AF: Often, no. I think the estimation process that we typically take in this space is based on experience. What we know it takes to build a particular piece of what the client's asking for. But it's all very much educated guesses along the way and kind of assuming we know enough to get us through to the end of the budget, end of the project.

BH: Yeah, it's asking thousands of questions sometimes because you're working on the internet. An example for me would be re-designing a website for a university.

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KL: Okay.

BH: Universities have multiple departments, multiple organizations. That means tons of web properties all over the place. So you could be working on, let's say an Admissions website for a university, and you think you've got the scope. Like you know kind of like the base of the website, what's included, what functionality they need. Those are all things that you would detail out in the scope. And then you're swimming along, you get through your research and design, and suddenly the stakeholder's like, "Oh, what about this sub-site that we built in 1999, that we feel like needs to be a part of this project?" And you're like, "That's not...we've never discussed this, it's not a part of..."

KL: Oh, the one I handles parking and parking tickets...

BH: Yeah, exactly, something that from your point of view would feel like really not a part of the scope, but they would make an argument that it is. That's the kind of stuff that we deal with.

AF: Yes.

BH: Yeah, usually you can make a strong enough case. Before, in the beginning, you would do enough stakeholder research, user research, and then detail out some requirements loosely at the beginning of the project.

KL: What you're suggesting is that you know that going in. That website work is going to proliferate always.

JH: Yeah, there's always going to be new ideas. There's always going to be priorities that shift. So I think naturally, because they're digital projects and products and not physical ones, like a house, I mean there is a little more flexibility there. We try and put some flexibility in our scopes and our pricing to handle that stuff. And we talk about it very openly like, "Hey, you will have a stakeholder that'll come in at some point and request something that we haven't talked about. That's fine, but it's going to come off of your cap, your total budget."

AF: And you can imagine our contracts look a lot different than, say, a government contract to build a particular object. And this has been a big discussion in this community: how to write a contract to accommodate that kind of flexibility but at the same time, lay down parameters for what's included. So again, it's a fine art form to try to figure out how to best educate clients in that as well.

(29:00) KL: So you are saying the word Art. It's Art over Science, in this sense. You have an inherently innovative changing environment, where lots of voices are telling you different things you're going to need as you move through, but you have to have of course structure to manage how we're going to get there. So, this is actually where Project Management comes from originally. But your product has gotten that much crazier. Alright, that much more in the ambiguous, perhaps?

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BH: Yeah, I think so.

KL: Or is it just changeable?

BH: Ambiguous is a good word, I think, because a lot of times our stakeholders or clients don't even recognize the amount of time and effort that goes into producing some of this work. You know they think, "It's a website, it's not like.. you're not carving something, you're not using your hands to build something like this is something that's just showing up on a screen it doesn't take time." But it actually does.

JH: Yeah, there's definitely an element of education for digital PMs. Because we're in this digital space, all day, and sometimes our clients are, sometimes we're working with product managers, or other digital PMs on the client side that they understand what we do. But a lot of times we're not... So there's an element of education. Just like I keep referencing a house in my head because I went through a home build. I had no idea about that process and the project manager was constantly educating me as we went. Like, "This is how it goes. You have these options. Weather is a big impact." So there's that element of education or for us.

KL: I want to talk a little bit about that because I can say it that I experience very simple things in my small company with my own IT. I sometimes don't understand the impact of what I just asked. I'll say like, "Okay, can we put the logo on the top left-hand corner?" And he's like, "Oh yeah, that's trivial can have that done before you even hang up the phone." And I'm like, "Oh okay, so we can change the questions on the survey." And he's like, "Oh no, wait, no no no, the way I built this that's going to require 30 hours of rebuild." I don't get it.

So this goes back to the education question, and I would imagine... Is that because people are still learning about our digital environment?

JH: Yeah, I think there's always going to be a requirement for education. And we are subject matter experts and certainly we look for PMs when we're hiring and stuff that have that background in technology and design. Because it helps you do your job better, but for any product owner or product manager, there's always going to be a level of education.

(31:22) KL: So you worked inside a corporate culture.

PE: Yeah.

KL: How did you experience a cultural difference from the inside versus being a consultant to it?

PE: In a corporate setting, they've hired designers and they're on staff and there they are. And there's some corporate branding that they're working within, and so they're sort of designing in a really in sort of a bubble. And when you're working in an agency, you usually have many design perspectives, usually more designers than you would find in a corporate setting, trying to break out of that bubble of what the current branding is, and trying to figure out a way to stretch maybe what even the client thinks that their stuff should look like. So I think that it's definitely more

creative.

There's a creative element to corporate projects, but I don't think they put as much of an emphasis on it as they do in an agency setting. Part of what people come to an agency for is that outside of the box, outside of the bubble thinking, so that they can... Because it's not something that they can produce themselves, they need someone else to help them find that vision.

AF: It's really to address that conversation or that question of, "We, as a client think we need this, we think we need A. But really, we're hiring you to tell us, what do our end users really want? So bring your creativity, bring your ideas, bring your understanding of who our end users might be of this product. And help us understand, is this really what we need? So there's this kind of big creative aspect to it.

KL: It's consulting in front of the project. Before you have something to manage.

AF: Right, right.

BH: Yeah, but also I think when you were talking, it struck me that part of the thing that I always loved about being a digital PM at an agency was that I was a part of that creative process, I wasn't just managing it, so ideas could come from me. I had a seat at the table. I was in brainstorming sessions – I was facilitating them. I was coming up with ideas that then could be transferred to the client and become a part of the end product. And I don't know if that's something that you get in the corporate world. I think in some spaces, you can... Because I've seen that. I don't think it's indicative of more, kind of like what I would call traditional project management.

PE: You know what's funny about that? The ones where you do get that in a corporate setting, is when the corporation has decided to put an "agency" into their corporation for that reason, so that there's like a smaller subset of an agency that they kind of own that will do the same thing.

JH: Clients actually sometimes higher agencies for that reason. They want the different perspectives, so they want project managers who will voice their opinions and be a part of their creative sessions. Because I think that part of the allure of hiring an agency, is you have people with...who have worked on a whole slew of different types of projects, and people that have managed all sorts of different projects, and can bring that creativity and past learning into their work.

(34:35) KL: I'm struck by something here that we're saying that we need to manage differently and we have the opportunity to manage differently and to build differently because these products are in a way, very different. And then when we talk about the stakeholders, and how you will talk to them, which gets to scope, it gets to expectations. Is there a tale to tell in dissonance between the stakeholder-style culture need/tradition and the products they not want.

In other words, I'm suspecting it might be easier to work with someone who knows they need a cool app to drive something that they're trying to promote because they themselves are an ad agency versus a company who is making ball bearings, who says "We need an app to allow people

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to select products more rapidly, because we want to become more competitive.” So the stakeholder is more of a traditional product owner who needs one of your products. Does that dissonance cause a problem?

PE: I don't think so, honestly, because I've worked on some projects where the subject matter expert and the user, the end user, is actually the people we are building the thing for. They know way more about what the end user would be, because they are themselves part of the end user.

KL: They know it so well.

PE: Yeah, they do. And so where something like, another stakeholder might say, "We don't know what the user wants." The only thing that changes for me is now, I'm going to ask that stakeholder the same questions that I'd be asking other users.

KL: Oh! It made it for an easier market survey.

PE: Actually, yes, actually it's easier because, you know what the target is right there and you're going to ask the right questions, right there.

KL: Do they think digitally, is the question. Does that matter?

AF: That's a good... That's actually the way I was taking your question. I think dissonance comes into play, when you were talking about the ball-bearing company, the hypothetical, they might not understand the pace at which an app is built. So, if you're talking about dissonance in terms of what they expect out of the actual management process or the process of building the thing, there can be a lot of dissonance there, and that's where this education piece comes in like, "This is what it's going to take. This is what you actually need to do to get to your product." You might need that cool app, but you... You're going to need to do user testing. We're going to need to iterate on this thing. And iteration is really scary

KL: They're like, "I want an app that drives customer use. Why can't I have an app?"

BH: I think we would say, "Well we need to talk to some of your customers before we determine if you actually need it." I think a lot of what we end up doing is answering questions in that way. Putting users first, making sure that we're not just building something for a business's internal needs. Making sure they understand the landscape of what their customers do digitally, that's usually baked into a process that we would work through.

(37:39)KL: Are these products typically things that you're going to market because you have the team you need to be able to do that? Or do you end up having to deal with vendor relations? I mean it's part of the PMBOK as well, right? The contracting acquisition of others who have to provide you support.

JH: Yeah, I would say for us, we work with other agencies, other subject matter experts, other developing partners all the time. Usually on larger scale products...

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KL: Is that pure volume?... is the question, because of the amount of...

JH: Not necessarily. Sometimes it's a different skill set. Sometimes it's a subject matter expert.

AF: We will often pull in people for... let's say we're building an app, and we have great expertise in building apps, but there's a particular kind of animation that needs to happen and we don't necessarily have an animator, we will work with either individuals with a particular skill set or other third-party organizations. Or let's say somebody needs a really deep dive into business strategy, something that maybe our organization doesn't do, we'll partner with people in that. But maintain a presence, so that we're part of that conversation at least until we get to the point where we're ready to build.

KL: Does this make for hard contracting though? The engagement. Is that hard to scope itself?

BH: I don't think scoping is a problem because everyone's kind of got their lane, as long as your client has identified all of the partners you're working with. To me, that's always been a problem. You know, like get 75% of the way through a project to find out that a company is redesigning their branding and logo. So you have to start all over. That's always fun. So yeah, I think everyone usually has their own lane. I think it becomes a matter of coordinating communications and scheduling in the right way... And I know earlier in my career I worked for a large digital agency, and we worked with pharmaceutical companies. And pharmaceutical companies would have multiple agencies working on multiple projects for a specific product. So there would be one meeting where all of the agencies came together and it was just a mess and contentious a lot of the time. People were trying to make it work out well. Yeah, I think we deal with that a lot in a lot of different respects.

AF: I think the biggest thing that you're talking about with contracting, whether that is easier or contentious. I think the biggest thing is that as a project manager as a digital project manager working with various vendors, you still need to be aware of their scope and whether they're – the other vendors – are getting done what they need to get done within the scope. And constant... it's about transparency and communication of dependencies.

(40:23) KL: What project management tools do you use to manage these things? How are you tracking cost or managing scope, looking at quality and schedules, when you are dealing with digital products, does that change at all? Are we all firing up the same...

BH: Digital PMs love to talk about this. For time tracking, what do we all use? Harvest?

KL: Harvest for time tracking...

BH: Harvest for time tracking and reporting, I also have a resourcing tool called Harvest Forecast that a lot of people use.

KL: It's for projections?

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JH: It's for a planning your team schedules.

PE: Yeah, resourcing.

BH: Project planning: obviously TeamGantt. I've used Microsoft Project. I have used...

Group: JIRA. Trello.

KL: Yeah, but which ones do you like and why? Why does it matter?

BH: Well, I think what matters is design. So I think one of the reasons Slack is so well used and adopted is because it's well designed and it's easy to use. I think that's really huge when you're work is a...

KL: What does it help us get done? Is it working with teams in what way, for people...

BH: Slack? It's a collaboration tool. So yeah, it's for real-time chat; it's for file-sharing.

PE: I literally couldn't work without Slack. As a remote project manager, I'm not going to get on the phone. I can't...

KL: It's replacing phones and meetings.

PE: Phones, meetings, yeah. You know, chatting. I can't go to someone's office. I can't ask someone something when they're walking by. I can't necessarily even do that at 9 o'clock because it's 6 o'clock somewhere else. Because I work with people all over the world. I wouldn't be able to do my job without Slack. And the reason why it's Slack and not something else is, right now there isn't something else that does that.

KL: So it's replacing the hallway in a traditional business. Or the need to walk down and talk to each other.

PE: Meetings. Conference rooms. Yeah.

KL: What else we got?

AF: So for ticket management we were talking...Brett mentioned Trello. We use JIRA and actually a lot of people in the non-digital space might be familiar with JIRA as well, or any of these ticket management apps.

PE: There are so many tools, that in any of the communication channels, or even in Brett's conference, there are whole conversations only about tools.

(42:43) KL: So what happens when technology begins to shift on us around things like AI, internet of things, augmented reality? Is this going to affect how we manage? Is this going to affect what

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we're building in any way other than it's just more of the same, kind of thing, we will work with?

JH: Yeah, I mean I think it's more the same. I think it's an evolution of what we've been doing. I don't think it changes the way that we manage projects I think it requires more education for clients and things like that. It's newer to everybody.

AF: And for ourselves.

JH: Yeah, and for ourselves.

KL: I don't know, I'm waiting for the day when someone goes to change the critical path, just a little change, and the machine says, "I'm sorry, Jim, you can't do that." (laughter) What do you mean? This is what the client wants!

BH: I think... I think it changes the way that we work in some ways.

KL: Have you had to deal with any of this already?

BH: Minimally, I think. What was it like, 2009-ish? When Responsive Design became a thing? That certainly changed the way that we produced artwork. So it changed...

KL: Describe that for people because it is an interesting...

BH: Yeah, so a Responsive website would be one that you can view in one version across devices. So the size of the screen scales to full-size desktop, to an iPad, to a phone, and every other breakpoint. between that.

KL: Yeah.

BH: So around 2009, I think it was, when that started to become a thing when people were coming to us asking for that, it changed the way that we had to think about producing content because the way the content is displayed at those different sizes, is a consideration. So then that changed our design process. It changed the amount of time that our developers had to spend on coding the websites, so it did change costing a little bit as well. But again, it was one of the things that we had to just figure out. It wasn't like, "Here's a new thing, go off and do it with the same scope." But I think we tried that once, and we were like, "Oh my gosh, this is a nightmare." These are all the things that we learned from it, this is how we have to adjust our process.

AF: That's what I was going to say absolutely. There was a painful period in there where we were figuring out what it meant for...what this new technology or this new approach meant for costing for the resources that we needed to put to it, but then we... We adjusted. And the same thing would go for what you're mentioning now. Any kind of new AI or augmented reality, we have to learn what that new technology implies for our process and for the products that we're building.

BH: And I think for us, we have to experience it first. We have to understand. We have to sit down

with the people who will make that thing and understand what they think they need to do.

KL: From your perspective, it is about seeing what's coming.

BH: It is.

KL: Okay because it will be a painful period.

BH: Well, and you don't want to hit a point in time where a potential client comes to you and says, "We're really excited about AI. What can you do for us?" And you sit there and think...hmmmm...I don't know... Because agencies can't do that.

KL: Well, we know a person maybe, I don't know.

BH: Right. And that's where a contractor might come in at some point as well. Ask a subject matter expert to come in and help you with that.

(46:10) KL: Because of the different nature of the product we have to manage differently.

PE: You know what? I mean, yes and no. Yes from like understanding how the scope is affected and understanding how long it's going to take to do a thing. But also not, because the general way that I manage projects is not fundamentally going to change. I'm still going to go through the same process, I'm still going to check the budget in the same way. I'm still going to communicate in the same way, I'm still going to try to make a timeline, I'm still going to do all those things, so yes.

But also the way you manage projects over anything, it kind of stays the same.

BH: Yeah, I totally understand and agree with what you're saying. Correct me if I'm wrong, but I think you're saying that the way that you handle your role, the way that you operate as a digital PM won't change. I think what changes is the process. Because I don't think that we'd all be sitting here talking about breaking Agile in a waterfall setting if it weren't for Responsive Design and new technology coming out. Because I think that's when we started to think about, oh, there are different ways we can do this. We can start coding in design and that'll get us four steps forward, and we can do this in a more agile way. Yeah.

KL: Agile in part came out as a response to... "Why are things not getting done effectively and on time?" Like... we're spending a lot of time, it appeared to be in some other environment, of doing a lot of overhead paperwork, and trying to plan things that are inherently not plan-able, and things along this nature is what caused part of that revolution, I guess. What's hard now, in the project management to develop these products, that someone will need to be thinking about, like, I think I could solve that if we change what we're looking at here, we could change, we could do that part better. You may not know the answer obviously, but what hurts now that is the thing that's the next thing that would be great if it could be addressed?

JH: For me, resource planning. Scheduling teams against all the various projects, and all the

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different skill sets and available time.

KL: What's hard about it now that's interesting?

JH: It's highly manual which it almost, at the moment, it feels like it has to be. Because everybody is different and everybody on your team has different skill sets and sometimes work hours. And I would say we spend a ton of time in kind of scheduling and planning, forecasting.

KL: Resource leveling and loading your project for making sure someone's available. But they're not the right quite skill set...

JH: Or something comes up, one of the... Somebody throws a wrench in a project, and it could shift other people's schedules. That's the biggest pain point for me at the moment.

KL: So somebody could listen to this podcast and solve that. There's money to be made in the digital world.

JH: Yeah, and there are people who are definitely trying to solve it. And there are tools that we use that are pretty good. Definitely, Brett mentioned Harvest Forecast, which we use, which I definitely like more than others, maybe leveraging AI to make that process smoother, or easier.

PE: I feel like if something came out that took the place of the five or 10 different tools that I use for different things, because like, for time check, I'm using Harvest, and for resourcing we're using Forecast, and there isn't one tool that does everything well. So I've got five different types of software products open at the same time, to try to do different things. Sometimes they talk to each other sometimes they don't. Having one thing or fewer things that could handle more things better I think would be a huge step forward for project managers.

KL: That's a common tension that well predates the digital age.

PE: I think it just happens so quickly with this stuff though.

KL: Yeah.

BH: Well, we all work differently too. Our teams are different, our scopes are different, the types of projects we take on are different. So the tools that I use are not going to work for Patrice or for Abby or for Justin or for you.

(50:18) AF: I think for me, a difficulty and it's become increasingly difficult, is hiring talent for what you need. I think you increasingly, I'm finding, we need to have somebody who has experience in a number of different areas in order to be that person that you need. So project managers who have experience in digital project management, but then also understand the technologies you're using, may have had experience working with interfacing very directly with clients. There's just a lot... So I think education...if somebody could solve that piece of... And this is huge...but of just kind of education in this space.

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BH: So, I think a really big kind of topic or challenge right now is this...is around process, and Agile being the buzz word that it is, people trying to adopt it and not being successful. I think we're all kind of pushing toward finding what is successful and I think for our community specifically, it is kind of a roll-your-own, blended process. So it's about hacking Agile and finding ways that work for you, and work for your team and your clients. So I think to Abby's point, like standardization is something that I would love to see, and it's something that I've been pushing for, but I think it's a standardization that project management isn't used to in terms of flexibility.

I'm not talking about a really rigid structured program like PMP, but something that is pulling from multiple aspects of project management and finding solutions or a framework, but maybe offering, you know, if this, then that, kind of a way of working...? But I'm not sure if that's it. But I do think, in general, in the future, I think we'll start to see that formalized more and more.

(52:24) KL: And you don't train for this in college or in an institute, I don't think, right? I'm seeing shaking of heads...

BH: Well Digital PM, it's starting to creep into university. Like I know that I've done a conference called Deliver in Manchester, in the UK, and there's a digital design class that comes to that conference, and they now teach project management, which for me is such an amazing sort of side effect of what we're doing here. Because I think where I come from, and the reason why I wrote my book is because I feel like everyone's a project manager in some way, whether you recognize it or not.

KL: Yeah.

BH: And to know that design schools are putting out these extremely talented designers who have no clue about how to manage their own time, but they want to start their own business right out of school, just breaks my heart, because they're going to fail. So to hear that they're teaching them some of the stuff that we're putting out there is really cool.

KL: I ran across this also in England in the school music. One of my earlier podcasts. Essentially, one of the punchlines is what you just said. "We're producing musicians who are all very excited about how they're going to become great, and they don't realize that you have to turn that demo tape in on time...and if there's a structure that you need to set aside to write your music, you need to take the time to do that." There's a plan. And you have to have a business plan as well, and it's like they don't get it. And we're producing all these artists that don't get it's a business and... And that you need to manage at some level.

How do you know when someone is good? What does it mean to become, you know, "I'm a junior PM in the digital space versus I'm a very senior person." Is it about things in the project management, anymore? In a lot of places you look at a resume, but I'm wondering if that's meaningful here.

AF: I think I definitely look at somebody's experience, a range of types of projects they've worked

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on, and the clients they've worked with, etcetera. But I think one of the biggest qualities, and this is very hard to gauge in an interview, but is adaptability and being able to work with a broad range of people, so clients internal teams, developers, designers, everybody...being able to work with a large set of technologies that you may not be very familiar with, but be able to learn very quickly. I think being nimble and adaptable is just huge and it is hard to find people who are truly adaptable. But that's kind of the top quality. And I think senior digital project managers just have a breadth of experience that teaches them how to be adaptable, and they know how to understand scoping a project, and estimating and all of those crucial pieces and on top of that change as needed.

JH: Yeah.

KL: Lots of nods around the table here.

JH: Yeah I usually look for specifically communication style. I really look for people that understand how to communicate naturally, right? So there are a lot of project managers that I've worked with, that I've met that are very rigid, and sometimes aggressive personalities, I really... Because we deal with so many different types of people, adaptability, being able to set clear and concise expectations, being really good communicators, is something that I look for. And then if they have... Maybe people don't always have the exact types of projects that we do here in their background, but if there're similarities, if there are similar technologies, I always feel like we can train people up at least on our process and how we do things. So I really kind of look for the right type of people.

BH: You can teach anybody how to create a plan and how to estimate and what process you should use. I think it really comes down to soft skills, and that person knowing what they're there to do and being a really good communicator and trying to get the best out of the team.

KL: Wow. We close the podcast and you drop the soft skills words on it, which is like another whole universe to talk about.

KL: Well, PMs, what do you think? Do you feel prepared to navigate this parallel universe? One element I find particularly daunting is the open-ended nature of the process. The number of iterations is expansive, so how can you manage scope and cost to keep these from getting totally out of control? You need to lean heavily on your communications skills. This includes client education. The more effectively you help them understand the possibilities as well as the parameters, the better your chances are for a successful outcome.

You can reach Brett Harned via his website – brettharned.com. The next digital summit will take place October 20th to 22nd, 2019, in Orlando. (Sorry...no virtual attendance as of this recording.) To find out more, go to digitalpmsummit.com.

Patrice-Embry.com, is where you can find all about Patrice, and even ask her a question! You can contact her directly there, or via her other electronic and social media outlets – LinkedIn, twitter, e-mail, etc.

Abbyfretz.com is a hub for links to all Abby's social media platforms. You can also find her at

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Louderthanten.com, where she teaches a weekly online course on Digital Project Management.

To find out more about Justin and his work, visit o3world.com. You can contact him there, or look for him on twitter - @justinhandler.

And if you're in the Philadelphia area, you might want to check out one of their monthly meetups - [dpmphilly](http://dpmphilly.com).

Special thanks to my guests – Patrice Embry, Abby Fretz, Brett Harned, and Justin Handler.

Announcer: Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Feldman, Rich Greenblatt, Lionel Lyles, and Hiroaki Honshuku. Post-production performed at M Powered Strategies.

KL: PMPs who've listened to this complete podcast may submit a PDU claim, one PDU, in the talent triangle Strategic, with the Project Management Institute's CCR system.

Use provider code 4634 and the title "PMPOV0063 PMs In a Digital World." You can also use the PDU claim code 4634ZAA82Z. Be sure to tune in to next month's episode where we will feature highlights from the University of Maryland's 2019 Project Management Symposium. You've missed it, but we have recordings. The first of our three-part series from the symposium will focus on Disaster Relief and Risk.

Mark Reeson: How do we approach such a situation when you're in that environment that is disaster? It's been labeled as the VUCA dimension.

Thomas Polen: But when you say five days, are you really thinking about this project, this team and what they have to do to get that five-day activity done...this time?

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