week::eight

Project Timelines & Time/Expense Tracking

Project Timelines

Why Important?

- Project schedules tell the client **when to expect** certain deliverables, as well as informing them **when they need** to respond to you in order to stay on schedule.
- They ensure that all parties involved with a project understand the **overall process.**
  - Most client infrequently by design, and the process can appear very opaque to them.
- Provides **justification** if a project falls behind schedule.
  - For example, if a project is late because a client failed to deliver content, then you can blame them (but not in a mean way).
- Helps with **scheduling** of internal resources, allowing you to look into the future and gauge your resource time commitments.
  - For example, on a Web project you'll know that your programmers will be busy near the end but might not have much to do during the strategy phase. Conversely, a Web designer will be less-needed during the programming phase and could work on other projects.
- Even if the project goes off the timeline, the milestones listed can help a client comprehend exactly what work is required of a design project.

Two Timelines: One for the **client**, and one for **internal use**

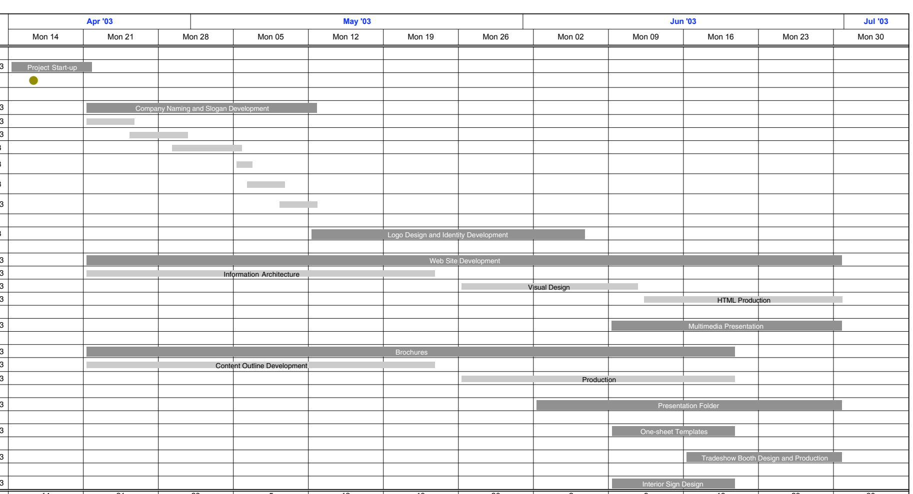
- Create one client-friendly timeline that specifically addresses the information that is important to them, and a second, more-detailed one that is for internal use only.
- The **client timeline** should be a high-level look at the project, giving them enough information to be confident in your process. It should also include any specific milestones/dates that require client input.
- The **internal timeline** can contain much more information: Internal deadlines and review dates, budget information, resource allotment (people-power), and other information.

GANNT Charts

- GANNT charts can be a helpful way to view your project by visually showing the **amount of time** a certain project component will take, and any **dependencies** between components.
- Can reveal unintended overlaps in project resources or phases.

NW CAD Services

	Activity Name	Start Date	Finish Date
1			
2	**Project Start-up**	4/14/03	4/21/03
3	**Kickoff Meeting**	4/16/03	
4			
5	**Company Naming and Slogan Development**	4/21/03	5/12/03
6	Client input/strategy session and backgrounding	4/21/03	4/25/03
7	Initial naming recommendations	4/25/03	4/30/03
8	Creative development	4/29/03	5/5/03
9	Presentation of name ideas and distillation to "short list"	5/5/03	5/6/03
10	Preliminary legal searching, in conjunction with a specialist law firm	5/6/03	5/9/03
11	Prepare for and present final name recommendation	5/9/03	5/12/03
12			
13	**Logo Design and Identity Development**	5/12/03	6/6/03
14			
15	**Web Site Development**	4/21/03	6/30/03
16	Information Architecture	4/21/03	5/23/03
17	Visual Design	5/26/03	6/11/03
18	HTML Production	6/12/03	6/30/03
19			
20	**Multimedia Presentation**	6/9/03	6/30/03
21			
22	**Brochures**	4/21/03	6/20/03
23	Content Outline Development	4/21/03	5/23/03
24	Production	5/26/03	6/20/03
25			
26	**Presentation Folder**	6/2/03	6/30/03
27			
28	**One-sheet Templates**	6/9/03	6/20/03
29			
30	**Tradeshow Booth Design and Production**	6/16/03	6/30/03
31			
32	**Interior Sign Design**	6/9/03	6/20/03



Strategies

- Only include **major project milestones** (presentations; launch dates) as well as any specific tasks or dates that are critical to the project.
  - You don't have to include every meeting or every round of design revisions.
- Group the major milestones of a project by the **same categories** used in your estimate.
  - This consistency helps the clients understand the various parts of a project.
- Include both items to be **delivered** to the client and **specific information/requests/tasks** you need them to perform.
- When the project start date is *known*, you can assign **specific dates** (or a range of dates) to project milestones.
- When the project start date is *unclear*, break the project into **weeks**.
  - For example, "by the end of Week 02 the creative brief will be completed"; "by the end of Week 05 the initial designs will be presented to the client", etc.
  - Unless the deadline is firm (like in the case of trade shows), projects can often fall behind schedule without doing harm to the client.
- Obtain **client signoff** on major milestones.
  - This commits the clients to the direction/specifications completed by that milestone.
  - Any changes after signoff can mean additional costs to the client—hard to justify without a signature.

Example:

bluehouse**group**

65 millet st. richmond, vermont 05477
802.434.7488 www.bluehousegroup.com

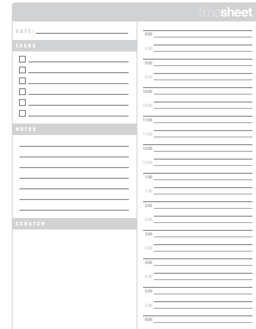
Project Timeline

Vermont League of Cities and Towns Web Site Project Milestones

Information Architecture	
Bluehouse Group (BHG) delivers recommendations regarding information architecture	Friday, April 7th
Vermont League of Cities and Towns (VLCT) & BHG meet to discuss proposed architecture	Tuesday, April 11th
BHG delivers revised information architecture; Architecture is sent out to appropriate VLCT department heads for review (if necessary).	Wednesday, April 12th
Group meeting at VLCT to review proposed information architecture (if necessary)	TBA; Sometime between April 14th—April 19th
BHG delivers final information architecture; VLCT signs-off on information architecture	Friday, April 21st
Visual Design	
BHG begins visual design process; VLCT begins content preparation	Monday, April 24th
Initial visual design presentation by BHG	Thursday, May 4th
Revised design presentation by BHG VLCT signs-off on revised design	Tuesday, May 9th
Site Production	
BHG begins Web site template production, ContentCreator™ implementation, and existing content integration	Wednesday, May 10th
VLCT to deliver all new Web site content to BHG for integration	Thursday, May 25th
Content integration progress meeting	Thursday, June 1st
VLCT begins online administration of Resource Library area	Monday, June 5th
Project status meeting with VLCT	Thursday, June 8th
Testing and Launch	
Soft Launch	**Monday, June 19th**
Final content edits by both VLCT & BHG; Site testing and debugging by BHG	Monday, June 19th — Tuesday, June 27th
SITE LAUNCH	**Wednesday, June 28th**

VLCT Web Site Project Timeline Page 1 of 1

Why Time Tracking is Important



Job profitability

- Time is the key to profitability.

Project benchmarks

- Gives you an idea of the progress of a project, and how well your business is doing.
  - Is it taking too long? Are certain expenses more or less than expected?

Back up for questioning by clients

- Can provide justification for an invoice.
  - In general, you do not send an hour-by-hour account of your work on a project to a client.
  - However, you should be able to present it to the client if requested.

Benchmark for improving future estimates

- Useful when estimating upcoming projects.

What's Billable?

Everything.

- All time spent on behalf of a client is billable, including client acquisition and proposal writing time, travel (beyond 50 miles), meetings, waiting for meetings, and phone calls.

Qualities of a Good Time Keeping System

Efficient

- A system is efficient if the forms and methods are **simple** and **easy to use**.
  - If it's too complex or labor-intensive, you won't use it.

Flexible

- It should be invisible to the client, but routine to you.
- Can scale as your workload scales

Complete

- Important for client justification and future reference.

Time-keeping Systems (note: not *billing* systems, though they can be one in the same)

Primary Systems

- Paper Time Sheets
- Spreadsheets
- Time Tracking Software (desktop and online)

Alternatives/Backup Systems

- To-do Lists; Appointment Calendar; E-mail In- and Out-boxes

Time Increments

On a task basis:

- Bill in quarter-hour intervals
  - The minimum billable unit should be .25 hours, even for a 5-minute phone call.

On a monthly basis:

- Set a minimum billable rate per job per month.
- One hour per month is a good start—increase as needed to control client behavior.
- Some shops have daily minimums, or minimums that are much higher than these.