··· **P R O J E C T   M A N A G E M E N T** ···

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To main contacts, CEOs, COOs, CFOs, HR contacts, interactive management directors, presidents, project management contacts and SFNAs.

Agency Project Management

This report is provided to assist agency management in developing and implementing Project Management (PM) roles and processes within their agencies. It explores the evolution of PM as an agency discipline, and principles that agencies should consider in determining how PM may be utilized to provide maximum benefit to both the agency and its clients.

Discussion includes a common definition of PM, value propositions gained from this discipline and differing project management organizational structures.

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What Is Project Management?

Project Management is the discipline of organizing, managing and communicating with resources in such a way that these resources deliver all the work required to complete a project within defined scope, quality, timeframes and cost constraints.

The Project Management Institute's "Body of Knowledge"[*] defines a project as "a series of tasks, arranged in a defined sequence or relationship, which produces a pre-defined output or effect. A project always has a start, middle and an end."

Project Management in a creative working environment is the process of driving individual projects through the agency, from the moment a work request comes from the client through the delivery of final materials. It's an independent role comprised of people committed to managing the internal process flow.

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[*] The Project Management Institute is a non-profit organization based in the United States, which develops standards for Project Management and certification testing for PM professionals. In 1981, the PMI Board of Directors authorized the development of what has become *A Guide to the Project Management Body of Knowledge* (PMBOK Guide), containing the standards and guidelines of practice that are widely used throughout the profession.

How Did Project Management Evolve Into a Formal Agency Role/Department?

Historically, managing projects has been a valuable component of an agency's internal processes. Only in the last several years, however, has project management begun to be identified by agencies as a separate role that provides agency employees with distinctive career paths.

Prior to this elevation in status, project management responsibilities had been segmented into different roles within different departments in the work stream; for example an account staffer was tasked with securing approvals from a creative, while a print production staffer was tasked with creating a schedule to align with media insertions.

Agency managers began to recognize that most agency Producers, specializing in broadcast, print, digital, events, etc., were not in the position to shepherd projects through, from inception to completion. In particular, as job parameters and cross-channel needs were being defined, they needed to have a voice as the expert in their own discipline and not assume responsibility for the entire project. Most agency Producers, tasked to focus primarily on the quality or quantity of the production, needed additional support to navigate through the explosion of new media disciplines and how they could all tie in together at various checkpoints. *Please note: a Producer is not the same as a Project Manager.*

Agencies have traditionally placed a high value on traffic management because of its emphasis on "accountability" to schedules and task lists. Agency staffers who were fortunate enough to work with "über Traffic Managers," quickly saw the benefits of having a Project Manager in a centralized role and accountable for the work being performed; some project management departments started to form and as they formed, the rewards began to present themselves.

Senior agency managers found that timeliness and quality of work improved. Consequently, agency managers gave further support to a project management role by empowering those employees to assume responsibility and engage direct staff with demands of "This is due!" or "Your signature is required!" or "I see a potential for a bottleneck" or "Here are some options."

It became apparent to many of these same agency managers that agency project management would be more impactful if the individuals in those roles wanted to grow within that function, and not simply consider the experience to be a springboard to move into another department.

Why Should My Agency Consider a Separate Role of Project Manager?

Ask yourself the following questions. If you say yes to any of them, it's time to reassess.

- Do you find out too late that your jobs are not being completed on time?
- Are there issues that surface after jobs are completed?
- Is your team confused about who is responsible for performing certain tasks?
- Are there overlaps and redundancies in your work cycles?
- Are agency approvals being missed before the client sees work or the work goes live?
- Are verbal approvals eliminating the paper trails of accountability?
- Are internal reviews missed which might otherwise allow for comments on the work before it is presented to your clients?
- Is the work not at the quality you want or expect it to be?
- Is morale bad and causing a breakdown in teamwork?
- Do you often have difficulty completing jobs within budget?

Given today's varied media options, the process for getting work done has grown complicated and requires someone to own it from a neutral vantage point, with a basic understanding of the elements of all job types. This allows the subject matter experts (e.g., broadcast producer, print producer, studio, etc.) to truly focus on the execution. One media vehicle alone cannot drive the process for all because of the vastly different needs that must be considered in each of the varied executions. These considerations include maintaining consistent content across all vehicles while addressing various constraints—costs, timing and usage. Moreover, it should also be noted, that these constraints are further complicated by differing approval requirements, budgets, clearances, etc.

Simply put, project management can't be done just anyone.

At the root of the theory of project management is the neutral territory in which it resides. As such, a Project Manager's oversight encourages the overview of all media channels at one time and allows specialized producers to remain focused on the back-end production of the job.

In agency environments with large-capacity, cross-discipline projects, it becomes imperative to have a focal point of communication that possesses the skills to understand the relationships of different job types. All projects have what is commonly referred to as a Project Triangle—cost (budget), scope and timing. All three sides of the triangle shift as work is created, requirements change and ideas are fleshed out. The Project Manager must keep an eye on the ever-changing project triangle and resolve issues as they arise. As one or

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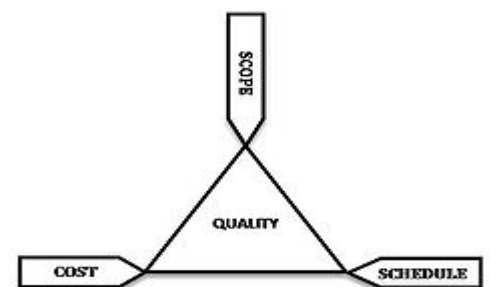
more of the sides of the project triangle shift, it has an effect on the other sides, which can risk the quality of all three sides if not managed. The Project Manager must constantly manage all three sides of the project triangle.

What Should Be Included as the Core Roles and Responsibilities of an Agency Project Manager?

The core roles and responsibilities of an agency Project Manager may frequently include:

Project Workflow Guidelines
- Agency Processes*—establish and enforce a streamlined workflow of agency processes.
- Time Guidelines—establish and enforce agency timing guidelines.
- Project Scope Management—monitor and communicate the impacts and/or risks of changes in project scope to the appropriate project stakeholders, and make necessary adjustments as may be needed, to ensure that project timelines, budgets, and quality are not adversely affected.
- Capacity Planning*—provide information to map out intended client projects in a capacity plan for review against other work in progress.
- Completed Projects—prior to archiving documented job histories, they should be reviewed to confirm that any changes to original scope parameters had been reasonably and properly addressed.

Project Time Management
- Scheduling—schedule projects with an implementation to execution (end-to-end) time table.
- Oversight—manage the schedule throughout the project lifecycle to track progress and make necessary adjustments for any changes that may be necessary.

Project Approval and Quality Management
- Approvals—secure approvals at all stages of the workflow process.
- Quality assurance reviews—ensure adherence to all quality assurance tasks to minimize the risk of errors.

Project Risk and Solutions Management
- Problem Resolution—monitor problem projects to ensure that issues are resolved satisfactorily and on a timely basis.
- Contingency Planning—as project risks become identified, provide for a mitigation and/or contingency plan, as needed, to ensure satisfactory and timely resolution.

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* Indicates task may be addressed at higher level of PM responsibility, e.g., Director of PM.

Project Financial Management
- Project Initiation—ensure that project job numbers have been opened, and estimates/ budgets have been established and properly approved prior to the commencement of work.
- Financial Oversight—track estimates to actual costs during the project lifecycle and manage costs to budget.**

Project Communications Management
- Centralized Communications—serve as the centralized communications point and ensure that all team members receive timely and appropriate project information.
- Meeting Scheduling—design meeting schedules to achieve effective communication and exchange of information between all key stakeholders.

Agency managements are encouraged to clearly define the roles and responsibilities of a Project Manager, and support him or her with all agency staffers who perform services for clients, since most will be engaged with the Project Manager on their respective clients' deliverables.

What Benefits Should I Expect to Gain by Adding a Project Management Function in My Agency?

A well-crafted and implemented project management function/role should provide several benefits to an agency, which will likely include:

Agency Resource Management and Centralization
- Managed production of shared assets across departments.
- Centralized overall workflow information providing better communication and cooperation between agency disciplines.
- Time freed up for agency specialists to focus on their areas of expertise.

Process Efficiencies
- An established central source of information and direction on project requirements; budgets, scope, timelines, and resource needs.
- Better management of agency resources.
- Reduced agency "do-over" rates due to increased awareness and adherence to agency process and procedures.
- A workload equilibrium, which allows for better distribution of resources across multiple projects.

** Indicates task may be achieved as a shared responsibility.

Quality Control
- Greater consistency across all projects, accounts, and departments.
- An increased level of client satisfaction and confidence.

Solutions Management
- An identified "Steward of the Agency," who takes all departments and project requirements into consideration when developing timing and resource recommendations.

Risk Management
- Minimization of agency risk by fostering operational efficiencies and facilitating compliance with budgetary parameters.

Staffing Resources – Development and Training
- An established career path for related agency staff.
- A training resource to various agency departments.
- Having a foundation to foster agency structure.

What Should I Consider When Developing a Project Management Structure in My Agency?

Agency Project Managers, often considered the "steward of agency process," function primarily within the internal agency structure. They serve to coordinate the activities between agency departments/functional groups to ensure that schedules are established, deadlines are managed and solutions are provided to obstacles that may arise during a project's lifecycle. Most PMs do not interact directly with agency clients, although client interaction may be required, especially upon client request in cases of highly complex projects.

Variables to Consider When Developing a Project Management Structure

Agency size
The structure of the project management team can vary depending on the variables of your agency. Agency size will be a key factor in determining the amount of staff you will need to provide ample coverage for all of your projects.

In a larger agency, project management may be centralized into a separate department, which may serve to manage overall agency workload and resources, often in conjunction with a creative resource manager. Staffing levels within a separate PM Department will vary depending upon specific client needs and the complexity of projects the agency undertakes.

As a benefit to agency staffers who wish to remain in a professional PM role, a separate PM Department also provides the opportunity of offering a future career path.

Understandably, the smaller the agency the more likely the role may also share responsibilities of another function, typically in the areas of creative resource management, production or account management. As a best practice, we recommend that an agency—regardless of size—has someone who performs the duties of Project Manager, as discussed earlier.

Agency Service Offerings and Reporting Structures
The agency service offering is another factor to be considered in determining how project management should be structured within the agency.

For example, in a creatively driven agency, the Project Management Department might report to the Executive Creative Director as a part of the creative resource team. In other specialty agencies, it may be more appropriate to have the Project Management Department report to a Director of Operations or Chief Operating Officer, as a part of the operations team.

Regardless of the servicing offerings of an agency, an important point to remember with regard to PM reporting is that the Project Management team report to an executive-level agency position. For Project Managers to be successful, it is critical that they receive this level of management support.

In positioning your agency's project management team, ideally:
- *Don't* position PM as a part of your Production team (online or offline). In an era of marketing integration, limiting PMs to production disciplines only will limit the opportunities for the agency to maximize the benefits of the PM position.
- *Don't* position PM as a part of the Account Management team. You should consider Account Management as the steward of the client and the client's business. Project Management is a steward of the agency and the quality of the agency's product.

Key factors to consider in setting up your project management structure include:
- Have the department or department head report to an executive position.
- Provide growth and career path opportunities within the department.
- Have clearly defined roles within the department *and* within the agency environment.
- Remove any overlap or gray area in responsibilities between departments.

A Note on Neutrality

Project managers must always have the best interest of both final agency work product, as well as overall agency goals in mind. For a Project Manager to be truly effective in shepherding projects through the agency system, he or she must be respected across-the-board. Therefore, it is imperative that the project management department be viewed as a neutral entity. If viewed as aligned with one department or another, PMs may struggle to gain the respect of all discipline partners.

Career Path and Positions

The following are examples of typical agency project management positions. In a larger agency, you may find all of the positions, whereas in a smaller agency you may find the agency's needs require fewer levels or a need to share roles and responsibilities.

- Director of Project Management
- Senior Project Manager
- Project Manager
- Assistant Project Manager/Junior Project Management Coordinator.

Summary

Overall, Project Management creates a sound agency structure that allows for a well run agency from all aspects of managing the business. Project Management is, in and of itself, a discipline that, if supported properly, can be successful in agencies of all sizes and specialties.