PROJECT MANAGEMENT

ASKING THE RIGHT QUESTIONS

BY JON BALON

Summer is in full swing! The kids are out of school and we all have one thing on our minds…vacation! Where should we go? What should we do? What's our budget? The list goes on and on. No matter the type of vacation, we all go through these questions when planning our memorable summer family experience away from home.

Jon Balon

While we plan this vacation, let's keep that big project at work front and center too. Is tackling that project really all that different from planning this summer's family adventure? In reality, the two are more similar than different. That being said, let's tackle both at once. After all, they both require time, attention, dedication, focus and, most importantly, a plan of action that allows you to break things down into bite-size pieces.

Know the Right Questions to Ask

Where is it that we want to go? This is likely the easiest question to answer and each question from here will get a little trickier as we progress through our planning. After some deliberation, we decide we are headed to the beach in South Carolina for our 2019 family vacation. When thinking about the work project, be it emailing consumers, texting consumers, or offering text to pay functionality, your objective is your starting point.

Now that we've designated the beach in South Carolina as our vacation destination, what's next? Let's start building on our high-level objective.

VACATION	WORK PROJECT
Beach Vacation in South Carolina	**High Level Planning**
When do you want to go?	When do we want to start this project?
Who is going to go?	Who is going to be involved in the project?
What sites do we want to see while we are there?	Projects can't go on forever, what time can we allocate to this project?
What is our budget for our trip?	How much are we willing to spend on this effort?
How do we maximize our entertainment budget?	What is our return on investment?
While in SC, what do we want to do?	What features do we want to offer our clients?

Our high-level planning is taking us to Charleston, SC for one week and our big adventure will be scuba diving for the first time. Your project should have a similar high-level vision statement. However, based on this statement we aren't quite ready to get started.

One Week in Charleston to Scuba Dive	Detailed Level Planning
Where do we want to stay?	How do we want to incorporate this into our current processes?
How are we going to get there?	Are we going to build this? Do we need to buy something? Should we involve clients?
What do we need to pack?	What all do we need to get started?
What is involved in Scuba Diving?	We have never done this, do we need training, do we need a partner to help us, do we need to hire team members with a skill we don't have?

In our vacation planning, we have a major unknown: scuba diving. It looks awesome when watching Shark Week on TV and friends rave about how cool it is, but we have no clue what we are doing. Many of the projects that you want to take on may evoke similar feelings. We have never done this before, now what? In this case, conducting research is the best way to determine what all is involved. With resources like Google and Yelp, it is easier than ever to maximize our

experience, by partnering with an expert. How do we pick the right partner? Here are a couple things to keep in mind during the selection process:

Select Scuba Diving Guide	Choosing a Partner
How long have they been diving?	What is the partners experience with the type of project we are undertaking?
Where will we be diving? What will we see? What should we bring?	What are the project details, project deliverables, and what is expected of us during the project?
How long is a dive?	How long will this project take?
How much training is needed for us to dive?	What do we need to do before the project starts to be properly prepared?
How much does the dive cost and what is included?	What is the cost and what are the deliverables?
How much is it if we want to keep diving?	What if we want to add features and extend the project, what will that cost?

In terms of our vacation planning, we seem to be in a good spot. We have our travel plans ready, our hotel is booked, we have started our scuba dive training, and are excited for our family vacation to begin. Your big work project is shaping up nicely, you have your partner and your start date is set.

Vacation day is here, the family is excited and the kids can't wait to get to the beach. We have all been there, it's going to be a great trip, let's go! However, we all know this is just the beginning.

Vacation Time	Project Starts
Traffic?	Team Member gets pulled off the project for a critical production issue.
Kids get hungry, that's not in the budget.	Oh, we need that feature and it was not planned.
Hotel was overbooked	Software being used is not updated and needs updated before starting.
Weather isn't looking good to scuba dive	Our partner resource's spouse went into labor, they are no longer available.

Life happens no matter how far in advance or well we plan. When beginning planning efforts, don't be afraid to tackle the "what ifs" early in the process. This helps better prepare you for any unexpected surprises that arise along to the way.

It is scuba dive day or, in the project world, go-live day! We have been on a wild ride thus far! We were three hours late getting checked into our hotel, one child forgot to reapply sunscreen and is experiencing sunburn for the first time, we are operating on two hours of sleep from the night before… but it's scuba dive day, so let's go!

We arrive at the dock, get on the boat, and are off to scuba dive an awesome shipwreck. What can go wrong? Will I get seasick? What if I see a shark? What if the boat leaves me? Remember, the risks of doing anything for the first time, are bound to be racing through your head, especially the day you go live. This is normal in life and can be countered with careful planning, trust in your team and a little bit of luck doesn't hurt.

The boat stops, anchor is down, and we are scuba diving. It is an awesome experience, the family is having a blast, the weather is perfect, and the sights are unbelievable. This is the moment you step back and say, "it was all worth it." Whether it's a crazy first-time adventure or a project that you completed, do not forget to celebrate that moment. You deserve it!

The vacation has come to an end, and although it's time to make our way home, we have created new memories that we will carry with us forever. In the project world, we have launched and now it's back to business as usual…until our next "vacation."

Conquering Procrastination

We all go on vacation, we all have adventures in life. Why are we so reluctant to start that project we have been talking about for months? We go through all the same steps, preparing for family vacation, but we seem to forget those same steps when we are planning that project. During our vacation we are bound to face unknowns, have emotional ups and downs, face challenges, and contemplate risks versus reward. These are all the same things we will face throughout the life of a project. When we step back and think about the completed project, we recognize we worked hard to get there. You set an objective, dove deep into the details, rallied the team, executed the plan. It feels good to see the fruits of your labor, especially when they create positive outcomes for the clients that you serve.

So that project you haven't moved forward with, stop putting it off. Treat it just like you would that cruise to the Bahamas and let's go on vacation!

I would love to see and hear from you during **CollectTECH19**, where I will be discussing the topic of virtual collections - what it is, and how we get started. Ⓖ

Jon Balon is currently the Vice President of Product & Innovation at Williams & Fudge, Inc. Established in 1986, Williams & Fudge, Inc. manages student loan receivables for more than 1,400 colleges and universities across the globe. Headquartered in the Knowledge Park District of Rock Hill, South Carolina, Williams & Fudge is family-owned and operated and is committed to contributing to the advancement of the communities in which they serve.