

THE UGLY DUCKLING PART 2:

Designing a Successful Project Management Rollout

By Vanessa Edwards



Welcome back to the second part of our Project Management article trilogy,

The Ugly Duckling: Project Management in a Creative Centric World. We've received a tremendous amount of positive feedback on the first installment, and were frankly surprised by how many organizations are needlessly crippling their profit, productivity and culture due to outdated conceptions about the value of an integrated Project Management discipline.

Unfortunately, realizing the need for change and knowing how to prepare, plan and execute for that change are entirely different matters. And while we realize that every organization is unique, with their own special set of strengths and weaknesses, there are some core elements of a successful Project Management discipline rollout that are common across any/all marketing service organizations.

Experience has taught us that this process must be treated with the same methodical care and thought that a Principal would put behind establishing a defensible niche, entering a new market or establishing a new practice. If all goes well, agencies will see an immediate and positive impact on profit, productivity and culture. However, if done haphazardly, the impact can be disastrous.

When rolled out poorly, we've seen a mass exodus of unhappy team members, resulting in high turnover and deflated company culture. We've also seen massive confusion, resulting in duplication of effort with little progress – or even worse, mismanaged budgets resulting in loss of profit.

To help you avoid these pitfalls, we've provided our methodology for a successful Project Management discipline rollout, outlined in the following steps.

1. Need Recognition

Before you can even begin defining a Project Management discipline, you have to first acknowledge the need for a dedicated, unified Project Management discipline. As we outlined in our first Ugly Duckling article, there are many roles masquerading as Project Managers in the agency world, but we feel strongly that the most successful PM discipline is one that is unified and integrated – and geared toward your agency's unique needs.

For instance, smaller agencies (less than 20 people) who have a strong niche most likely need dedicated Project Managers who can be both brand-level and SME PMs. But as we discussed in our first Ugly Duckling article, it isn't enough to have just SME PMs (often Producers); instead, you need a Project Manager who can be responsible and accountable at the brand or client level as well as provide detailed SME/niche project management support.

In a larger, full-service agency, we find it's most successful to have a tiered Project Management department, with brand-level Program Supervisors and Integrated Project Managers who have deep knowledge of your agency's workflow and how the work should be completed. These PMs are responsible at the brand or client level for a portfolio of programs, with support from Producers/SME PMs for complex projects, e.g. digital, broadcast, etc. We'll discuss the ideal structures in more detail below in Step 5.

2. The Integrated Project Management Discipline "Champion"

Prior to introducing the concept of an Integrated Project Management (IPM) discipline, you first need to identify a credible "Champion" who will be the passion and drive behind the proposed discipline. This responsibility cannot be taken lightly!

What is a "Champion"? It's more than just a cheerleader or supporter of the idea. A Champion is someone who can be accountable for the Project Management discipline rollout, leading and guiding all the steps outlined within our methodology to ensure a successful rollout. The Champion is someone who can effect change within the agency,

garner support from necessary team members, understand the agency's culture and anticipate how the new discipline rollout will be received.

This person – or people – needs to have strong agency project management experience and needs to understand best practice project management roles and responsibilities within a marketing agency environment. This isn't necessarily going to become the leader of your Project Management team – however, this person will most likely be a member of the new team.

If you don't have anyone internally that can do this, you can utilize an outside expert to help educate your team on the PM discipline – however, you will still need an internal resource to work with this expert and champion project management within your agency.

3. Leadership Buy-In + Alignment

One of the most important factors to this rollout being a success will be having your agency executives and principals on board with the idea. You really need this to come from the top, so if you don't have the support and buy-in of your senior leaders, you'll only be setting yourself up to fail. The last thing you need is to go through all the steps outlined here only to have a senior leader belittle Project Management and ruin all the work you've done.

4. Communications Strategy + Plan

Once you have a Champion and senior leadership buy-in, you need to create a Communications Strategy and Plan for how you're going to roll this out to your team. Depending on your size, this could be done in one all-team meeting, or it may take multiple department or team focused meetings to introduce the idea. The ultimate goal for your Communications Strategy and Plan is to keep everyone informed and get them excited, so that they can contribute to the rollout and potentially become additional Project Management Champions.

In your Communications Plan, you need to define not only how you're going to announce the new discipline to your team, but also how you're going to make it "sexy". Unfortunately, there is a stigma surrounding Project Management in the agency world. Sadly, there aren't that many people who set out to start a career as a creative agency Project Manager; most of them fall into the role because they want to work in marketing at a cool company.

Your goal will be to help your team see the immense value of the Project Management discipline, the benefits it will bring to the entire agency, the opportunities for professional growth and development and understand it as an equal partner to the Account Management discipline.

5. Organizational Structure

Now, you're ready to define the ideal structure for your agency's new Project Management discipline. Your Project Management department should include a mix of junior and senior roles, where the layers you need are influenced by the type of work you do and the size of your accounts.

We feel strongly that your Project Management department should include both subject matter expert PMs (like Digital Producers or Broadcast Producers) as well as brand level PMs. SME PMs provide an invaluable expertise to their specific areas, while brand level PMs provide overarching project management of all client programs and initiatives. Determining how many PMs and what levels of PM you need will happen once you do Account Mapping of your current accounts (see Step 9).

You will also need to define a reporting structure for the new discipline and determine who the PM lead will report to. Ideally, the Project Management discipline will roll into Operations or Finance – NOT into Client Services. Having Project Management roll up into Client Services is a huge conflict of interest, because your Client Services lead is the ultimate client advocate and you need your Project Management lead to be the ultimate agency advocate.

6. Workflow + Process Audit

This is probably the most time consuming aspect of defining your Project Management discipline – reviewing your current workflow and processes to determine where project management currently lives within your agency. You'll need representatives/leaders from each service line that will be affected by project management – including client services, creative, digital/tech, traffic/resourcing, accounting, etc.

Your goal is to review your current agency processes and workflow for billable jobs to see how the work is getting done, who is doing what, where are the project management responsibilities falling and what areas could be improved. It is critical that your Project Management Champion is included in this process so they can identify which tasks or responsibilities are truly project management responsibilities and map them to the current roles that are performing those tasks.

7. Roles + Responsibilities with Job Descriptions

Once you have a clearly defined workflow and documented set of processes, you can start to pull out the project management pieces that need to be layered into the new roles. You will need to define all the tasks and responsibilities for each role you defined in your ideal organizational structure earlier, remembering to include both junior and senior level duties.

Once you've finalized the project management roles and their associated responsibilities, you can create job descriptions for each of the new roles and begin discussing the new roles with existing team members.

8. DiSC Testing + Behavior Mapping

You should begin filling in your new project management roles from your existing team members. We don't recommend creating an entirely new Project Management team from outside the agency, as most agencies are mis-staffed rather than under-staffed and couldn't afford this burden. Doing this could significantly lower your agency's profitability and leave you with a team of Client Services people with little to do...and we know what happens with idle hands.

We would, however, recommend you take this opportunity to staff a well-trained Project Manager from the outside to support the training and guidance of the less trained Client Services personnel that may be moving into a project management role.

Moving staff from Client Services to Project Management is the most sensitive part of the whole rollout; if this is done poorly, it can sink your project management deployment. We recommend performing behavioral testing – like DiSC tests – to measure your current Client Services team's natural abilities and tendencies in an effort to help determine who would make a better Project Manager or Account Manager.

Often, you've got a gut feeling of which current Account Managers would make better Project Managers, but you really can't make that decision for them – you have to let them come to that conclusion on their own, and we have found that behavioral testing like DiSC can really help make that happen.

Behavioral testing is also another opportunity to reiterate the differences between the Account Management and Project Management disciplines and to get employees excited about the prospect of becoming a Project Manager.

9. Account Mapping

As you're conducting and analyzing the behavioral tests, you should also be mapping your existing client accounts to the new project management roles you've defined so you can determine how many Project Management team members you will need and at what levels.

The structure of which roles you need at rollout is highly dependent on your agency's capabilities and service offerings, as well as the size of your accounts and how much of "the work" your team will be doing. There is no perfect formula for calculating how many Project Managers you need on your team, but we find that it is easiest to think of the Project Management team in relation to the Client Services team.

For example, if your current Account Managers do the bulk of the strategy work or social media/community management, you will probably have a higher ratio of Account Managers to Project Managers. Or, if your AMs are solely focused on relationships and building business with existing accounts, then your AM to PM ratio will probably be closer to 1 to 1. But, if your PM will be expected to do work like content entry or if you need subject matter expert PMs for your various service lines, then you will probably have more PMs than AMs.

For those agencies that have access to good data from their time tracking systems, we'd recommend looking up – by client – how much time was spent doing account management vs. project management work. This could give you a good place to start with account mapping; however, you should still use the above guidelines as a gut check.

10. Transition Team Members to New Roles

Hold one-on-one meetings with any Client Services team members who you feel would make better Project Managers, and present the option of a new role to them. We've found this has been most successful when people are presented with the new job descriptions of both Account Management AND Project Management. Most of the time when they see the new responsibilities, they will gravitate more towards the role that best fits their personality and skillset.

For those that are still struggling with being moved into a Project Management role, we let them know that this PM role is what the agency needs right now – however they can apply for an Account Management job in the future, once a position opens up.

We strongly recommend that you provide immediate project management or SME training to these new PM team members, as they will not be as strong as the candidates you may have brought in from outside who have been formally trained as Project Managers.

11. Integrated Project Management Discipline Rollout

Once everything has been finalized and team members are excited about their new roles, it's time to introduce the new discipline to the rest of the company who hasn't had as much exposure to its development. This is your chance to get everyone on the same page about what Project Management is, how it will work in your agency and how valuable and important the discipline is to the company as a whole.

We've seen this work really well as a large team-building event, where you can mix in some fun with the nitty-gritty details of the new discipline.

12. Client Communication

We've heard from a lot of agency executives who worry about how to present this new Project Management discipline to their existing clients and we understand this hesitation and unease. However, when you explain to your clients that this new Project Management discipline will allow them to receive stronger and more valuable brand stewardship and strategic guidance from your Client Services team, as well as more efficiently run programs, we have found that clients tend to get excited about the new role. Keep in mind – in most cases, this project management work is already being done, just inefficiently, which means it shouldn't add more hours to project budgets.

When communicating about these new team members to your clients, make sure to clarify how they should work with these new roles. Explain to your clients when they should contact their Project Manager vs. their Account Manager, and clarify when they should expect to hear from each person. Remember: a Project Manager should be copied on all client communications in order to be kept in the loop; conversely, Account Managers should be looped into communication anytime program strategy, brand stewardship, budgets and/or approvals are involved. (For more details on the differences between these two distinct disciplines, check out our blog post "The Project Management – Account Management Divide.")

13. Change Management

The final piece to any successful Project Management discipline rollout is continued and ongoing change management facilitation. You need to be there for your team, listening to concerns and complaints, publicly rewarding positive attitudes and behaviors, engaging your project management enthusiasts and generally keeping a close eye on how the rollout is going within your agency. Doing this right means being flexible, adjusting your communication strategy as needed, identifying unforeseen challenges and leading your team over unanticipated obstacles.

This isn't a "set it and forget it" type of rollout; a new Project Management discipline will require consistent nurturing and maintenance to ensure that it is moving forward in the right direction, with the fewest number of speed bumps possible.

Sounds easy, right?

I know... it's a lot to take in and fairly overwhelming. But we feel very strongly that if you follow our methodology and introduce your new Project Management discipline in a well thought out and fully planned manner, you will have a successful rollout!

However, we know that things don't always go perfectly smoothly, so the final article in our Ugly Duckling Trilogy will focus on what pitfalls to watch out for and what missteps to avoid, including:

- Why having Project Management report to the Director of Client Services is dangerous
- Why establishing Project Management as an equal partner to Client Services is essential
- Why proper Project Management training is critical to a successful launch
- Why all Project Managers are not created equal
- Why visionary leadership + employee growth for a Project Management discipline are vital

About the Author:



Vanessa Edwards is a serial entrepreneur, professional jet pilot, former agency owner and founder of Creative Performance Inc, a consultancy that empowers agency owners to achieve their cultural, operational and profitability goals. As a FunctionFox, Workamajig and Oracle PLM partner, she

has helped over a 100 marketing services organizations (agency + brand) through large-scale organizational change, complex technology deployments and strategic planning.



Contributing Author: Jessica Stephens

CPI Blog <https://cpi.consulting/category/blog/>



☎ 866-578-8611 ✉ info@cpi.consulting
🌐 cpi.consulting