

# Stories of a Creative Project

*Journey of a New Marketing Manager*

Alex Kowalczyk



## Table of Contents

|  |    |
|--|----|
| New Manager in The Game.....                                       | 4  |
| Week 1: Selling The Proposal.....                                  | 5  |
| The Challenge: Go Public Before Spring.....                        | 6  |
| The Problem: Sense of Security.....                                | 7  |
| The Lesson Learnt.....   | 7  |
| Hints For You.....   | 8  |
| Week 2: The Magic Project Triangle.....                            | 9  |
| The Challenge: Make The Quote Complete.....                        | 10 |
| The Problem: Missing Project Triangle Pieces.....                  | 13 |
| The Lesson Learnt.....   | 17 |
| Hints for You.....   | 17 |
| Week 3: Deadlines.....   | 19 |
| The Challenge: Get Commitment To Deadlines.....                    | 20 |
| The Problem: Afraid To Commit.....                                 | 21 |
| The Lesson Learnt.....   | 22 |
| Hints for You.....   | 23 |
| Week 4: The Project Plan.....                                      | 24 |
| The Challenge: Present The Plan to Team Members.....               | 25 |
| The Problem: Team Members Do Not Understand The Plan.....          | 25 |
| The Lesson Learnt.....   | 31 |
| Hints for You.....   | 31 |
| Week 5: Keep Control.....  | 33 |
| The Challenge: Right Things Done Right On Time.....                | 34 |
| The Problem: Paranoia of Controlling Project Must Be In Place..... | 34 |

|  |    |
|--|----|
| Get Off From Email!.....                       | 37 |
| The Lesson Learnt.....                         | 39 |
| Hints for You.....                             | 39 |
| Week 6: Being Assertive. Or Not.....           | 40 |
| The Challenge: Late Change Request.....        | 41 |
| The Problem: Customer Is Not Always Right..... | 42 |
| Hints for You.....                             | 51 |
| The End: Project Success!.....                 | 52 |
| A Word From The Author.....                    | 53 |
| Image Credits.....                             | 55 |

# New Manager in The Game

## *Monica's first day as a Project Manager*

***Monica** is a new Account Manager in **Q&D** creative agency. Her first challenge is to prepare, sell and drive a new PR campaign for **Slow'n'happy**, a global slow food restaurants network. As spring comes, they want to perform a new countrywide campaign.*

*Monica has just switched her job and wants to show herself as a professional in the new workplace.*

*You might be interested in Monica's story and what she has learnt during her first project.*



# Week 1: Selling The Proposal

*How to get Your Customer to Buy Into Your Idea*

*First Monica's challenge is to prepare, present and sell the project proposal to the customer.*

*The most daunting marketing challenge for the **Slow'n'happy** restaurants is that businesswomen and busy managers avoid slow food restaurants because they misbelieve that the meal will fit the lunch break time. White collars usually spend quite a bit of money on lunches, so the restaurants network want to attract more customers from this group.*



## The Challenge: Go Public Before Spring

Monica has just started negotiations with the customer. She prepared a great brief proposing how this marketing project should look like. She included the ideas how to make the campaign laser-focused and not to lose millions on prime time ads.

Monica proposed to focus on: LinkedIn, hard copy business magazines and on sending bunch of CEO-only discount coupons to selected CEOs who can forward them to their business partners. Also included ads in a few fashion and lifestyle magazines that are read by office assistants, who often have a great influence on the place where their bosses eat lunches. She was well prepared, she had optimistic approach and a lot of enthusiasm! She invited Olivier and his team for the presentation.

And the meeting became a disaster. She presented all the ideas listed in the brief. Bullet after bullet. Olivier put Monica through the hoops asking about subtle details of every single step in the campaign: dependencies, effort required and costs. She has not been prepared for such a detailed conversation and she had a feeling that the customer's hidden agenda is to depreciate the value of the campaign or herself personally.

Finally Olivier expressed his doubts whether the campaign will achieve the goals as expected. He underlined the tight timeframe, as people are motivated to eat healthy when first sunny days come. So it is important to go public before spring begins.

## The Problem: Sense of Security

The customer was reluctant to the campaign proposal, because Monica hadn't ensure his sense of security. The skepticism resulted from missing important piece: the schedule clearly shows the ownership of each step.

Olivier was afraid that his small marketing team will not manage to perform the campaign in such a short time, while in fact Sophie assumed (but not stated clearly enough!) that most of the work will be done on her side.

Not having all the data, Olivier thought that this campaign schedule might be too ambitious. He realized that the project can become a constant death march and can miss the goal to start promotion of his slow food restaurants on the spring solstice.

## The Lesson Learnt

Once you have your project plan ready, you need to communicate with the customer. Of course you can use a

spreadsheet or a to-do list, but the best way is to plan the project with an appropriate project\_management software.

Then you are supposed to set up an appointment or a teleconference. Share the schedule with your customer, by the way, in [FoxyTasks](#) you can do that with just one click. Explain the proposal in details. Even if you receive negative feedback it is very probable that you will arrive to some conclusions and get a second chance. **Don't you ever just throw your proposal through e-mail without interactive follow-up.**

## Hints For You

- DECOMPOSE YOUR PROJECT INTO ACHIEVABLE TASKS
- THINK HOW MUCH EFFORT AND TIME EACH TASK WILL COST
- PROVIDE YOUR CUSTOMER WITH THE PROJECT PLAN
- EXPLAIN THE PLAN TO ENSURE THAT CUSTOMER FEELS SECURE
- HELP YOURSELF BY USING DECENT PROJECT PLANNING SOFTWARE



# Week 2: The Magic Project Triangle

## *Ingredients of a Creative Project Proposal*

*Monica decided not to give up and work more on her proposal. She talked on the phone with Olivier and he suggested a talk on next week.*

*Of course Monica was afraid to jeopardize the second chance. Next day still without a clue, she has set up a meeting with her boss to ask for help.*

## The Challenge: Make The Quote Complete

After a few minutes of meeting and after reading the proposal, the boss frowned her eyebrows and asked if the document is complete, which Monica vigorously confirmed. The boss took white board marker and drew a triangle.

Every project has a few aspects you have to define and control, and project managers call that a 'project triangle'. In fact, the triangle sometimes has even more vertices, although there are the three basic ones:

- What: the **scope** of the project
- When: the **time** in which the project has to be done
- How much: the **budget** of the project.



These parts of the project triangle usually depend from each other. When a client states that the website should be dual language, you have to adjust the time and the budget. When a client wants you to finish the project earlier, you will have to spend more for overtime work, additional freelancers or a new tool.

In the middle of triangle there are some important details, which show your ability to deliver the project within *what*, *when*, *how much* constraints: how will you achieve the goal,

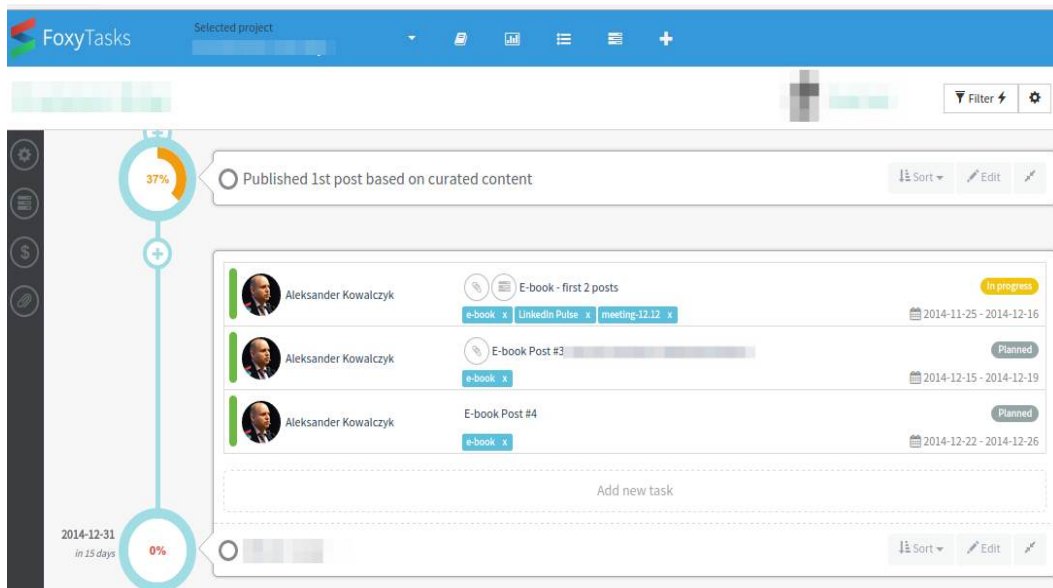
who will do necessary tasks for you, with whom you have to communicate...

These details were the missing pieces in Monica's proposal. The meeting with Olivier became a great success: he actually started to believe that the campaign plan is thoroughly thought and defined in each necessary detail. He even offered support of his team in terms of a few tasks that Monica marked as the most effort-consuming.

Olivier accepted the proposal and they signed the contract!

# The Problem: Missing Project Triangle Pieces

When



The more challenging the campaign idea is, the more insecure the client will feel if other ingredients are missing. “When” is the key piece of that puzzle.

Your client does not know much about PR campaigns: what is easy and effortless, what is hard and sweat squeezing. The client might be overwhelmed by the scale and by the apparent complexity of your brilliant plan.

You have to assure the customer that your plan is rock solid and well thought. Show deadlines on each step of your project. List all the phases or major tasks in a table. Set up deadlines and indicate major inter-dependencies. This will help both you and customer to believe that the project is feasible and realistic.

### How Much

Sometimes this is the most difficult part. The customer asks how much would that campaign cost. The agency responds with the question “how big is your budget?”. The customer is reluctant to reveal it, because this might impact the price stated by the agency.



Price is an important part of the offer. Many clients do not want to tell how thick wallet they have, so be prepared for presenting multiple variants.

How to deal with it? Prepare 3 variants or “packages” of the campaign: inexpensive, optimal and extended. Instead of going too deep into defining details, give the customer a choice in a form of simple comparison table. The customer will choose the one, or will ask for some combination of the packages, while you can be pretty sure he will select the most he can afford to. So you will not lose the opportunity to earn even more.

## Who

A customer might not appreciate your plan because he's afraid of being overloaded by tasks required to do.

For instance, Ethan might have been scared that he will not manage to prepare all the input materials required to perform the campaign.

What might help is to clearly indicate the tasks or phases when you will really need your customer activity. Suggest how much effort will be needed and who is the right person to do the task.

Also you need to firmly state that you are responsible for all the rest so you will do it on your own, without bothering the customer.

## **With**

Ensure that you have all the team members required to achieve the project goals. Yeah, one of the greatest risks is to start a project without assigned by name executors of every task. Remember you should start mitigating this risk just after you identified it.

In case you cannot find the right person, there are many ways to deal with that. You can hire a freelancer, contract a subsidiary. You can find the right person on networking meetings in your area, or in social networks. Sometimes your customer can help too, so do not hide the risk from him once you have run out of ideas. The later you start mitigating the risk, the less options will be available for you.

## **How**

The project itself have many subtle inter-dependencies between its tasks. Ensure you have not missed casual links between them.

One of methods is to identify major milestones in the project. Milestone is a key event or point in the project, which will not happen until some other activities are not done. Usually this



is a “no way back” point, when you decide to go or not to go into the next phase of the project. For instance, good moments for milestones are: before going public with the campaign, or before sending PDF materials into publishing house.

Note that milestone might depend from multiple tasks: be a kind of “crossroad” on which all the pieces glue together.

## The Lesson Learnt

Comprehensive project proposal will organize your creativity. Take small extra effort to prepare and write the complete proposal including all these project triangle ingredients. This will help both your customer to validate and buy into your idea and you to self-discipline around the proposal constraints.

## Hints for You

- REMEMBER THE PROJECT TRIANGLE VERTICES: WHAT, WHEN, HOW MUCH
- ESTIMATE EFFORT AND TIME REQUIRED TO COMPLETE EACH TASK
- IDENTIFY MILESTONES AND DEPENDENCIES
- DEFINE DEADLINES TO THE TASKS IN THE PROJECT PLAN

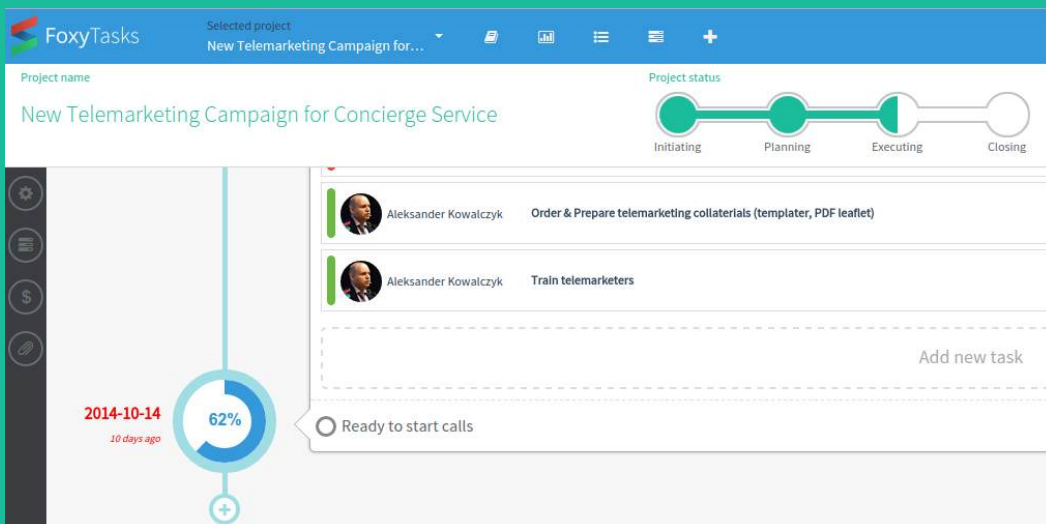
○ CHECK IF YOU HAVE ALL COMPETENCES REQUIRED TO DO THE  
PROJECT IN PLACE

# Week 3: Deadlines

*Missing Deadline Is The Indicator. Unless You Do Not Have Any.*

*Monica prepared draft schedule of her campaign and invited the art director and a few more key players to a meeting to discuss the deadlines.*

*She introduced the schedule draft to the meeting participants. The team members stared at the screen and looked at each other. Then the art director asked: "why we need to plan these dates now? They will move anyway!". The rest of group supported this statement with nods and murmurs.*



## The Challenge: Get Commitment To Deadlines

Monica loves deadlines, just like me. We believe that no project can be successful without imposing deadlines. A project can not be finished on time without the deadlines. No project will be unambiguously successful without a reference to time axis.

But there are multiple points of view when it comes to deadlines.

The first is the customer's (or sponsor's) perspective. They perceive project as a very simplistic triangle of the scope, the budget and the time frame. They believe they may place some input to this triangle: enough amount of €/\$/£, team, scope and deadlines, and at the end of the day they will see the output: specified scope done, resulting in particular benefits, like a new product sold, a business process optimized, or a successful marketing campaign.

The opposite view, is the one I saw many times when setting up a new project plan with my team. Somebody tells exactly what Monica heard: "Why we need to plan these dates? They will move anyway!".

## The Problem: Afraid To Commit

Even some managers state similar opinion that date-driven project planning is inherently problematic, requiring numerous rewrites over the life of the project.

But when you don't set the dates is like you would choose to never finish the project. It is the best way to obstruct it and make your customer or investor angry and insecure. And that's because...

### **... Where Milestone Is, The Date Must Be**

Setting up milestones as important events is meaningless if you won't set the dates for them. Even if your project is a very risky initiative, and you are afraid of committing any dates - set them up. You will help yourself, your customers and bosses.



## The Lesson Learnt

When choosing not to set dates you take away from you the opportunity to plan the cash flow and to find the moment when it is the high time to abandon the project or to radically change its direction. Which, in case of risky projects, shall be done, sooner or later. The milestone with the deadline is the tool helping you to become pretty sure that current approach won't produce the hoped results. Having the time-framed milestone is the right moment to review the results and decide that they justify continuing the direction.

Both milestones and its deadlines are the key concepts of project management. My advice for all managers doing projects: setup the deadlines, even if there is a risk or certainty they will move. This is very important managerial tool, helping you and your team to self-discipline and to focus.

## Hints for You

- SETUP DEADLINES FOR BOTH YOUR AND YOUR TEAM'S TASKS
- CONVINCING YOUR TEAM THAT THE LACK OF DEADLINES IS AN ILLUSIVE COMFORT
- DO NOT BE AFRAID OF COMMUNICATING SCHEDULE SLIPS AS SOON AS POSSIBLE

# Week 4: The Project Plan

*How to prepare a schedule that will be your great tool*

*Monica was very happy as her customer's partner Olivier approved the proposal and requested to start preparing the campaign.*

*As the project seemed to be quite complicated, Monica prepared detailed project plan. Then she invited her team for a kick-off meeting to present it and start the activities.*

The screenshot displays the FoxyTasks web application interface. The browser address bar shows the URL: <https://app.foxytasks.com/main#companies/5733935958982656/projects/5706456892440576>. The page header includes the FoxyTasks logo, a selected project name "30 customers in 90 days", and a user profile for "Marek Szade".

The main content area shows a list of tasks assigned to "Przemek Berliński". Each task includes a description, a status of "Closed", and a completion date. The tasks are:

- Event which button (which pricing plan was clicked) - 2014-11-24
- Prices - plan change and add "Splendid" PayPal plan - 2014-11-24
- Pricing page - lighten top screenshot - 2014-11-24
- Pricing page - remove "social spread of word", put "no credit card required" - 2014-11-24
- (1) bullets (2) Splendid plan - 2014-11-25

Below the task list is a section for "Pricing adjusted" with a progress indicator showing 100% completion, dated 2014-11-25 (2 months ago). Below this, there are tasks assigned to "Aleksander Kowalczyk" and "Przemek Berliński".

The interface also features a sidebar with navigation icons and a "Filter" button in the top right corner.



## The Challenge: Present The Plan to Team Members

Monica came into the kick-off meeting a few minutes before the team. She powered on the projector and displayed the schedule. The team members started to appear in the conference room.

After a few moments she started the meeting and presented the schedule piece by piece, detail by detail. The team asked many questions. Some people pointed out that there are missing pieces, some could not understand what should they do. Monica patiently explained every detail and after 2 hours wrapped up the meeting. She sent the project plan to her boss and to team members.

The art director prepared the first designs a few days later. But the graphic designers were confused, because they have not understood that they have a task in her project! Even though Monica booked their time in agreement with Traffic Manager...

## The Problem: Team Members Do Not Understand The Plan

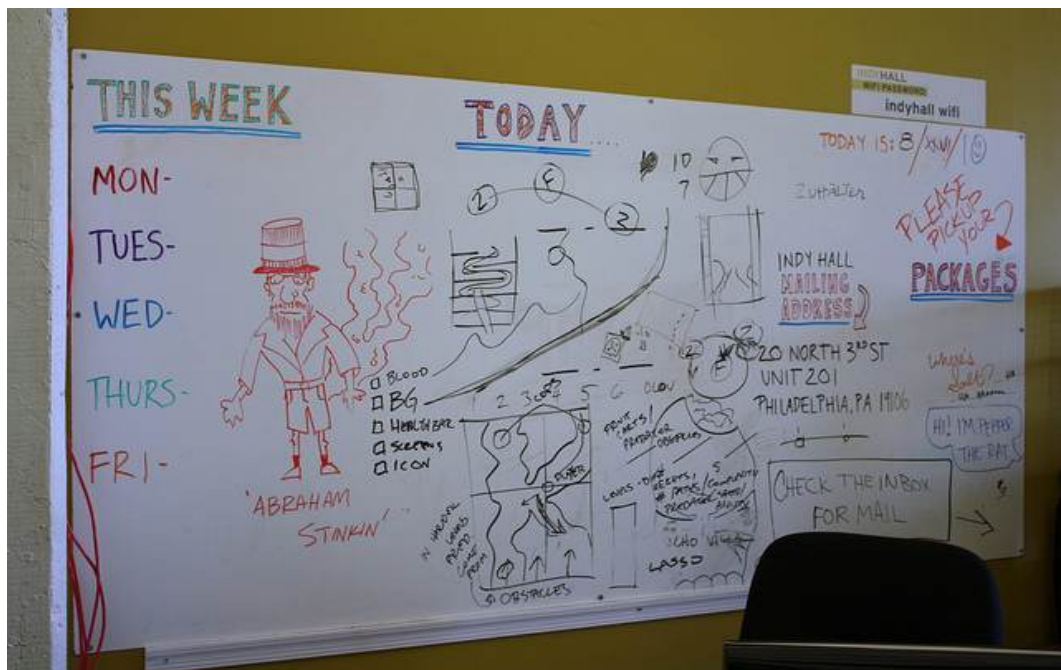
Recently I did a customer research for [FoxyTasks](#) project management app. I enjoyed very interesting and inspiring

chats with many creative project managers. All of them are successful and professional, but they often have completely different needs and approaches to project management techniques. Differences between them are quite well reflected by how their project plans look like.

The style of a project plan should depend on the environment too. Managers use various styles of planning, often reflecting their characters, backgrounds and attitudes to life.

### Whiteboard with Sticky Notes: The Team Player

One of my friends told me that I influenced him to start using the whiteboard, and it was the most important management technique (or the only one?) he copied from me.



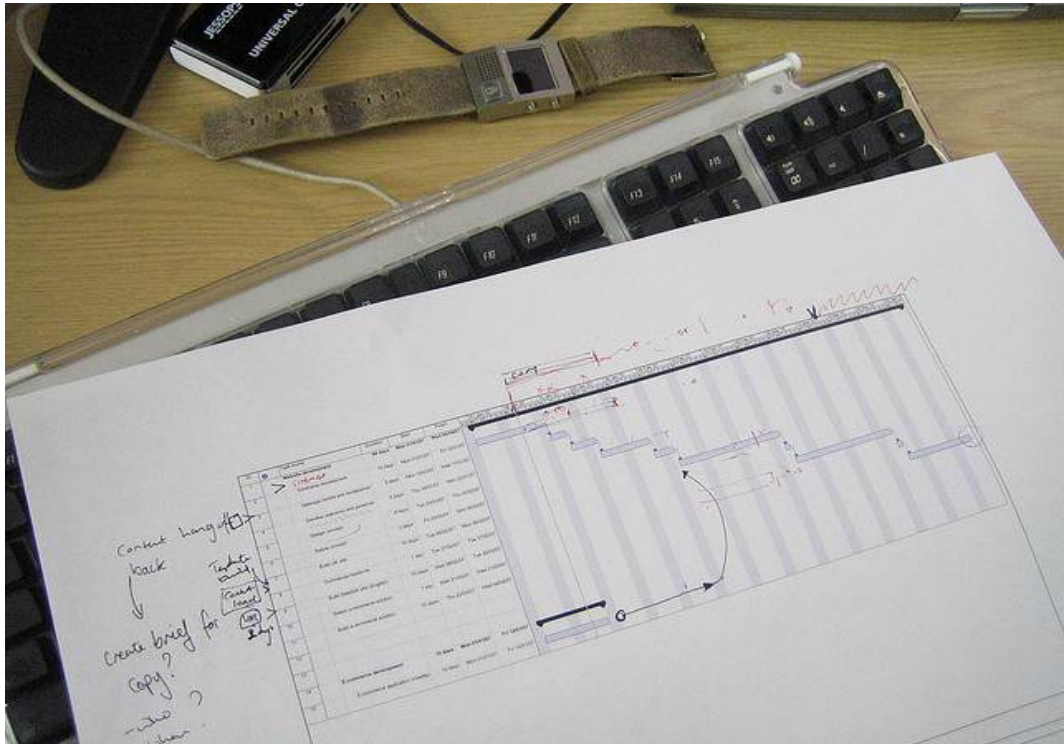
The whiteboard is a great information radiator, the tool which propagates the project status to your team. Project managers who are team players often use the whiteboard as a their scheduling tool.

There are a few management techniques focused around whiteboards: you might have heard about Agile, SCRUM or Kanban.

### **Gantt Diagram: The Control Freak**

A Gantt chart is a network of dependencies between the tasks. In eighties and nineties it was believed to be useful in projects, especially in construction and engineering. The example of a Gantt chart is on the picture. Looks reasonable for you or makes you stare with a dumb smile?

There is one issue with Gantt charts. The simple schedule quickly become so sophisticated that only a manager with extraordinary orientation on details is able to manage it on day-to-day basis. You will be tempted to add another level of details, add another dependencies (lines between tasks telling what should be done after what) and end up with something complicated and unusable on status meetings and team discussions.



Even if the manager is able to work on the Gantt chart (there are some), usually he or she is the only person in the project team with this ability. So nobody else uses that project plan!

## Bullets In An E-mail: The Exceptions Manager

When your schedule is in your note-taking application, it might be the sign you are oriented on Managing by Exception<sup>1</sup>. Such a manager must be exceptionally good at

1 Management by Exception is a term commonly used in *PRINCE*, one of project management methodologies.

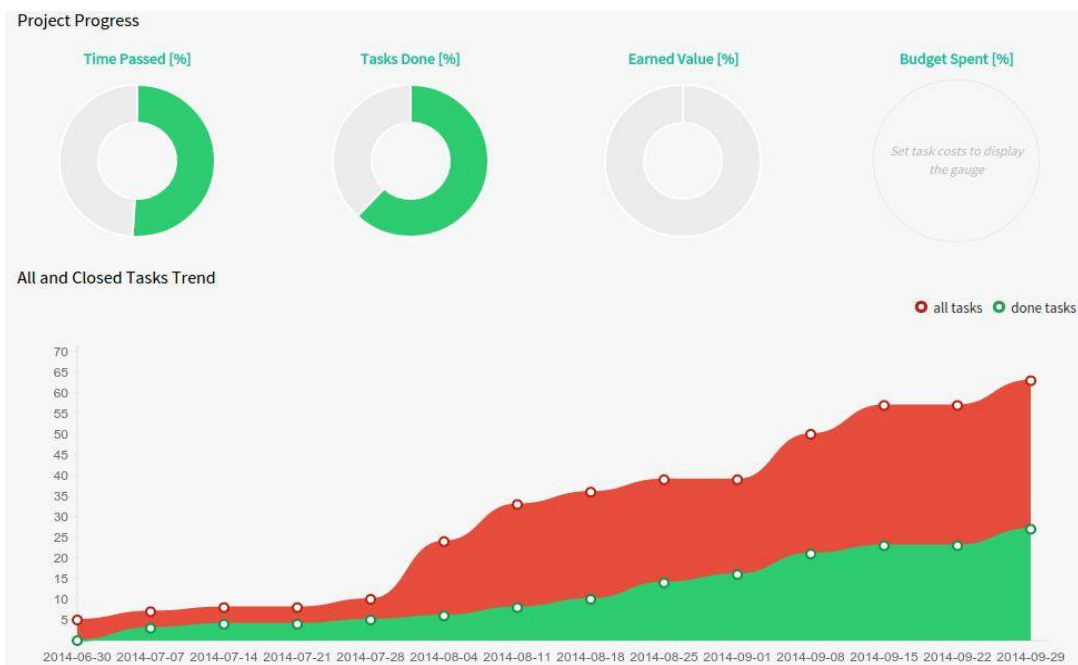
choosing right people, contracting services, assigning roles and responsibilities and establishing commitments.



And the manager must have great intuition, must expect great organization, self-discipline and engagement from the team members. She/he checks randomly in places where the intuition or little signals indicate risks, or just waits for so called “exception”, when somebody comes to ask for help in resolving a risk or problem.

## Colorful Charts: The Analyzer

Modern management is full of colorful drawings, charts and trends, thanks to modern project management software. The analyzer loves them and can show and explain on a colorful chart every single aspect of his project. The analyzer's charts help to cover project complexity and better understand the general conclusions.



He always keeps up with latest tools and presentation techniques. His customers and boss are amazed by his project status presentations.

The trouble might begin when somebody asks for more details: it might occur that the manager knows all the synthetic indicators in the project, but does not have a response to questions like: “tell me more about the three most important risks in the project”.

## The Lesson Learnt

And the most important, key message I heard during one conversation. The best managers are able to adjust their project management techniques, including schedule, to perception skills of the people around them, project importance and complexity.

The whiteboard will be of no use if your team are accountants or they work in remote locations. Gantt diagram won't do if you work with people who are not accustomed to the project management regime.

## Hints for You

- ADJUST PROJECT PLANNING METHOD TO YOUR TEAM, SPONSOR, CUSTOMER
- DOUBLE CHECK THE PLAN IS LEGIBLE FOR THE STAKEHOLDERS
- ENSURE THAT FOLKS AROUND CAN READ GANTT CHARTS BEFORE USING THEM

- YOU CAN DIVERGE PLANNING STYLE OVER TIME
- INCLUDE ALL PROJECT TRIANGLE DIMENSIONS IN YOUR SCHEDULE, REGARDLESS OF ITS STYLE



# Week 5: Keep Control

*Ensure Your Team and Freelancers Do Great Job, On Schedule*

*Monica improved her schedule and all the team members confirmed they understand everything they should do.*

*On Friday she met with the team again. She asked a few questions and the answers thinned her face. It seemed that the project has not progressed at all!*

## The Challenge: Right Things Done Right On Time

Monica almost yelled at the team: “you all told me that everything is clear and simple, and now it appears you have not done anything!”

Art Director responded: “Yes, but the client have not sent us the brand book on time and later our graphic designer had some personal issues and delivered a bit crappy piece of art...”

Monica was not too happy about that. She reviewed the project plan together with the team, task by task. She quickly understood the key issues and impediments that were blocking the project's way to success.

## The Problem: Paranoia of Controlling Project Must Be In Place

When hiring a freelancer or inviting a team member to do a part of your marketing project, there is usually the same concern: whether he will deliver the product of his work on time. Regardless of what is their fruit of labor: design, content, blog post, animation or website, they all are creative souls.

Recently I have talked to many marketing managers about their most painful problems. Quite often I have heard that the most burning issue is the reliability of individual contributors. Some of them are very reliable although deliver fair but not excellent content. Some of them deliver extraordinary, impressive things, but you can't even hope they will deliver it on time, or they will meet your specification.

Once you know that you cannot fully rely on timeliness of a freelancer, or just started cooperation with a new person in town, it might be good to have a toolset of managerial techniques helping to get what required and get it on time.

### **Checkpoints!**

Make sure that the day of the deadline is not the first time you see what the freelancer's has done for you. On the first meeting you supposed to agree on some interim reviews.

Explain clearly what you expect on each review: a sketch on paper, final draft. Plan to verify the checkpoint by yourself or delegate it to somebody who you trust will do that as well or even better than you.



## Meanings

A concept, sketch or draft can have very different meaning for you and for your cooperator. And this meaning can be a subject to relaxation and downscaling.

If the freelancer is late for any reason, he can even present you a sketch done on a napkin as a final draft and honestly assure you that this is what he always does as a final draft. So clearly define in advance what means final draft for you.

## **Draw and Note**

Draw the meanings and timeline on a piece of paper or your tablet. Note what you both told about deadlines, meanings. Note every date and action item.

It might be your freelancer's job to successfully deliver on time, but you are the manager, so make sure you really manage: send the note to your cooperator after the meeting or call. Might be a bit frustrating (am I his admin assistant?!), but it's better to frustrate yourself than to screw up your whole marketing campaign.

## **Get Off From Email!**

An email conversation becoming longer than 3 emails is a clear indicator of the necessity to switch to another medium. E-mail is not for brainstorming, not for resolving problems, not for lengthy discussion.



Your freelancer might tend to communicate via email because he is sitting with his ultra thin, shiny PC with a nice logo in a trendy cafe and has not a time pressure that you have. He's just sending you a doubt or trivial yet blocking question and is switching to another project. He can also order next coffee and may talk with another customer. But this is your project which will be delayed.

So once your email conversation is longer than 3 emails, call him, chat with him, or take a trip to his trendy café. A simple call done just on time can save even one or two days of delay caused by misunderstandings in an e-mail discussion.

## The Lesson Learnt

These techniques will often do. But they will not guarantee anything if your contractor is just a bungler. You cannot fix his inability to create or no pursuit to excellence or lack of motivation. One important thing is that regular checkpoints, clearly stated, measurable expectations and note taking might help you to discover that issues early enough to find a solution for such fundamental problems too. The eye of a master does more work than both his hands.

To avoid such a scenario, it might be good to build a network of reliable and well-tested cooperators around you. Talk with your colleagues, check references and never throw a business card of a talented man!

## Hints for You

- BE PARANOID DURING MONITORING&CONTROL PHASE.
- ASSUME THAT: IF ANYTHING CAN GO WRONG, IT WILL.
- THE SOONER YOU ASK, THE SOONER YOU WILL FIND THE ANSWER.

## Week 6: Being Assertive. Or Not

*Project Changes Are Also Relationship Game.*

*Monica quickly fixed the things on the project and got back on track. She started to smile again and focused on advancing the project.*

*The next week she received a call from her customer Olivier. He did a small talk about the project status, and then dumped the bomb: Slow'n'happy wants to refresh it's logo design.*



## The Challenge: Late Change Request

Monica knew from her past experience that late change requests happen. And most of the time there is a rationale behind it. However doing rebranding while an advertising campaign critical for the quarterly revenue has been already advanced is not a simple thing. Movies has been already recorded at a restaurant with **old logo**. Publishers already received advertisement drafts with **old logo**. Website colors were adjusted to the **old logo**.

Monica became overwhelmed by the situation and consulted the issue with her boss. The boss decided to request an appointment on senior management level, with Chief Executives of both sides. She told that such a meeting is called *steering committee* sometimes.

This was the first C-level meeting Monica participated in. She was excited although she has not understood everything. But the key message was: the rebranding was postponed to next quarter.

The next day Olivier called and he was more than just angry that **she** killed **his** rebranding initiative.

## The Problem: Customer Is Not Always Right

I do not believe that customer is always right. There are many cases when the customer is not right and cannot be right, especially in businesses like marketing, product development and consulting, where the results are intangible and depend strongly on subtle details.

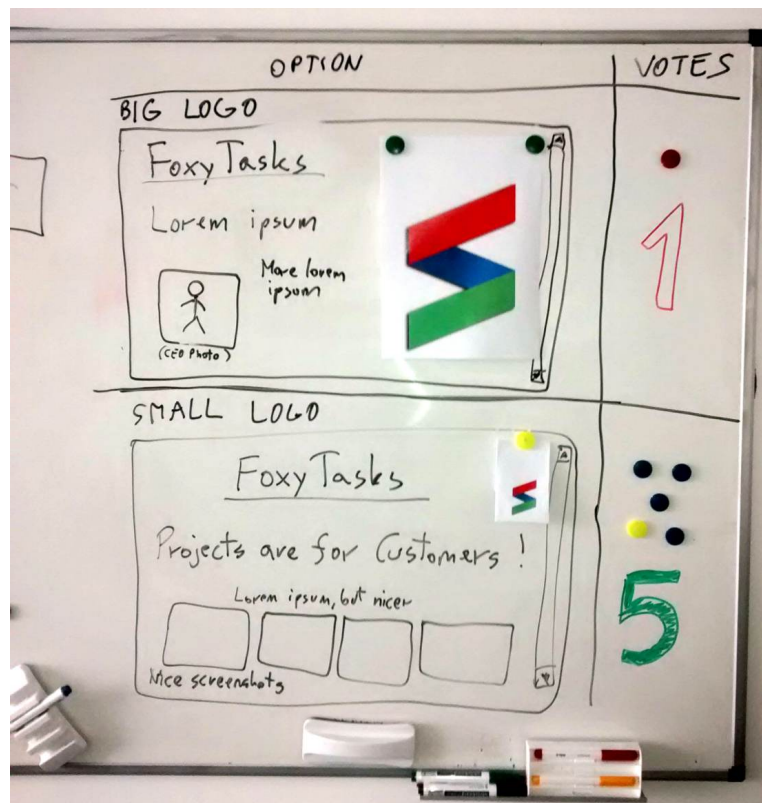
### Relationship Game

Monica and her boss played the game almost right. They noticed an essential, late change request to their project and launched the right tool, the *steering committee*. But the one step wrong was not to identify the *force field*. It appeared after the rebranding decision was reverted, that her major partner was also emotionally engaged into the idea of rebranding, and took significant role in defining the new visual identity. Probably Monica should firstly convince Olivier to postpone the rebranding initiative, and then present the proposal together. This would help Olivier to save face, and Monica would avoid the resistance.

Here are some other common situations when customer can be wrong and suggestions how to handle with it.

## The Logo Size

Yes, it's trivial. And it occurs thousand times a day all around the world, round the clock.



A marketing expert designs a new website or a flyer. Everything is harmonized, subtle connected and has astonishing look.

Then the customer looks at the design and says: "I like it, but please make the logo much bigger. And put CEO photo beside it!". The final result looks like a scam site, but the customer paid you, so he's right, yeah?

**How to handle:** Do quick corridor tests. Go out of a conference room and ask a few people in the kitchen which design they prefer. There is no warranty for this solution, it may not always work when you are in a hostile environment inhabited by engineers, bankers or lawyers!

## Customer Knows Better



There is a common scenario that the customer's coordinator is better than you at your job. Important disclaimer: sometimes this is true. If so, admit it and take the opportunity to learn from the best. For instance, the customer needs to outsource part of the work because of being overloaded.

But usually it is not true at all. The person who orders your service just wants to build an image of an expert, either in front of you or in front of colleagues or boss.

Endless discussions about the important not yet critical details, unclear overall direction, quotes from important magazines and experts, scholar knowledge. All these are clear indicators that your partner has ambitions to be better than you, although feels insecure or is lazy enough to don't take the sole responsibility for doing the real, hard work.

**How to handle:** It might be a bit witty hint. Generate an (un)necessary work for the customer: a kind of ambitious task to ensure she is busy enough to not disturb you in doing your job. The great tool for that is a huge spreadsheet template full of different cells to fill with numbers, x'es and colors. Just throw this spreadsheet to your customer's inbox to gain a few weeks of peace and calm. One risk with that approach is that one day you will receive the spreadsheet filled, possibly with significant improvements (additional tabs, cells, filters). And someone, presumably you, will have to at least roughly analyze what was created.

## A New Player In The Game

You got a contract and did your best to provide your marketing service and you worked with the coordinator customer assigned to the project. You have a gut feeling that there is a little of hesitance in actions and decisions of your customer's contact. You also think that these decisions might



not be the best ones, and frankly speaking, not in line with the assumptions you had recommended in the campaign brief. Then, usually near the end, a new person starts coming to the meetings. It might be a boss of your coordinator, or

someone from different part of the company. The new player begins to negate the decisions taken months ago, turn inside out basic assumptions of the project and put the project goals in new light.

**How to handle:** So-called Change Control Process. It is a buzzword beloved by corporations. Please be careful with this tool: it is not the right way to prevent all the changes, as in general changes are good!

Once the new player proposes a change to the original agreement, add it as a new task in a project management app. Label the task as Change Request. Remember to estimate the cost for the change and the delay expected by adding this change to the project. Then show the changes list to the new player and ask him to ensure with stakeholders in his company if they are OK with the changes, their cost and schedule slip.



## It's Your Fault

Great thing about being an independent marketing agency is that you are away from so-called "office politics". OK, you are away from office politics until you start working on a B2B



project with a big corporation. It is not uncommon to get into a cyclone eye, where forces can be stronger than a small agency can stand. You land between opposite factions within the corporation. The departments have different

goals, or just bosses compete with themselves for the promotion. The project is delayed because of the tension and lack of consensus. Then, near the original deadline, both fractions notice that the success is at risk. It is too late to fix the things, so they start looking for the guilty one. They can't blame each other, so you are the best candidate to be finger-pointed!

**How to handle:** You have two options. Either on the beginning of the project you require from your customer to designate one of his employees as the project coordinator, who will be responsible for reconciling and providing you with clear customer decisions on time. Or you accept the responsibility for reconciliation on you, possibly in exchange for an additional "project management" fee. This might be the right path to go if you really love to manage projects and have good project management tools helping you to coordinate customer tasks.

### **The Lesson Learnt**

There are no simple projects. In every project there are situations which must be handled assertively, for the sake of the project constraints. It's up to you to choose the best way to handle. Talking is always better than avoiding discussion. Finding back the common goals is usually better than fighting.

## Hints for You

- ENGAGE THE STAKEHOLDERS BEFORE PROPOSING DIFFICULT DECISIONS
- BE ASSERTIVE WHEN YOU ARE SURE IT MAKES THE PROJECT SUCCESSFUL
- MAKE SURE YOU UNDERSTAND THE FORCE FIELD AND HIGHER LEVEL GOALS
- SECURE YOUR OPERATIONAL FREEDOM SPACE
- ASK ANOTHER PEOPLE OR EXPERTS FOR OPINION WHEN YOU HAVE PROBLEM WITH CONVINCING THE CLIENT TO A GOOD THING

# The End: Project Success!

## *Celebrating and Having Fun*

*By stopping decision of rebranding Monica saved her project from troubles and successfully drove the campaign to the end. Slow'n'happy restaurants started to be crowded by businesspeople at noon. Lunch dishes sales skyrocketed.*

*Olivier invited Monica and her team for a celebration in Slow'n'happy restaurant located at the main square. They ate great oysters straight from the boat, ratatouille of extremely fresh vegetables, accompanied by a few bottles of organic rosé.*

*And she's looking forward to the next exciting challenge: the visual identity refresh project!*



## A Word From The Author

I hope you liked the story of Monica.

Probably you are one of many project managers, who are very professional, creative and do great projects. You downloaded the e-book, so you are striving for excellence. And the awareness of improvement possibility is the best indicator of a great project manager. Always be ready to receive feedback from other people. Learn. Read. And the most essential one: think independently, think out-of-the-box, do your projects with enthusiasm. Win and have fun!

### Your Thoughts?

Do you have thoughts, remarks or improvement suggestions? Please share your feedback with me by clicking this button:

Share your thoughts

### About The Author

I am an entrepreneur and project management expert. My experience and passions include managing big, risky projects, software engineering, quality management and building PMOs. I am an enthusiast of business process automation, modern management tools and employee-oriented management methods. I am the founder of [FoxyTasks](#), the start-up with a mission to help marketing managers and creative agencies effectively organize their projects, tasks and budgets. I presented on various international conferences in the fields of marketing, project management and quality. I frequently publish on specialistic portals and in hard copy magazines. Privately I love road bicycling and Mediterranean cuisine.

If you would like to contact me, try through [pl.linkedin.com/in/aleksander](https://pl.linkedin.com/in/aleksander) or [@alek kowalczyk](#). In the invitation please state you are the reader of this e-book!

The e-book was inspired by stories told by real “marketing people” we have met in various places, especially on Marketing Day conference.



FoxyTasks



# Image Credits

*Creative Commons license, Commercial Use Allowed:*

## Chapter 1

- [Greg Smith](#) - Urban Stereotype For CW

## Chapter 3

- [Andrew Kuchling](#) - Milestone

## Chapter 4

- [Jonny Goldstein](#) - Ye Shall Know Them By Their Whiteboards, Indy Hall:  
4
- [Flain Farrell](#) - A work of art
- [Todd Huffman](#) - Inferior Pakistani Rounds

## Chapter 5

- [Yann Gar](#) - CheckPoint Charlie;
- [Ervin Strauhmanis](#) - Phone security

## Chapter 6

- [a2gemma](#) - Point!
- [Keith Allison](#) - Legends of Golf in Savannah,
- [Philo Nordlund](#) - Finish

Remaining photos (c) 2014-2015 Aleksander Kowalczyk. FoxyTasks screenshots  
(c) 2014-2015 OffiServ Sp. z o.o.