

THE
Art & Science

OF DIGITAL PROJECT MANAGEMENT

CASE STUDY: THE FORGE

When I began my role as VP of Account Services at 20nine Design, there was no system in place for managing the daily activities of the 10 or so staff of designers, copywriters, strategists.

Unless you count a whiteboard with the names of each resource, and the main client or project they were working on that week. Every Monday the team would get together and try to summarize what needed to happen that week.



THE CHALLENGE

- 1) We lacked the ability to properly plan for resources (both near and long-term), which resulted in resources constantly being overbooked.
- 2) There was no way to tell when things were due, how much time was needed on each project, or how much time was actually being spent in the end.
- 3) There was nothing wrong with the weekly meeting on Monday, but it did not account for the fact that by Tuesday everything would change.
- 4) We used an antiquated piece of software (Clients & Profits) for billing and invoicing and could not change that system.
- 5) Resources were required to enter their hours every week. And since they had no real record of what they had actually done that week they spent 2 hours every Friday basically making it up and then entering their hours into a cumbersome system.

THE SOLUTION

- 1) Initially I got us set up on an off-the-shelf solution (Mavenlink), and instituted a daily status cadence.
- 2) I hired an in-house developer and we eventually realized that we could easily build our own platform using an open source node.js approach.
- 3) We began to organize what we wanted into a proper Kanban board with the features we needed and began to map out/build the architecture.
- 4) Once we had enough of a basic structure in place, we got the designers involved to help optimize what we were doing and iterate. This also gave us the opportunity to add proper UI/UX design and brand the system (making it completely ours).
- 5) We discovered that Clients & Profits accepted *.CSV files - meaning that we could easily connect the system for planning and tracking hours, directly into the AR system.

THE RESULT

- An awesome, truly Agile project that became a team building exercise, and gave everybody a little bit of ownership into how we managed our process(es)
- Increased productivity across the board and removed the need for resources to enter time
- Removed a costly inefficient system with an accurate, easy to use system
- Converted approx. \$125,000* of wasted overhead hours back into billable revenue

The screenshot displays the 20nine project management dashboard. At the top left, a 'HOME' button is highlighted with a red '1'. The main area features a 'STATUS TIMELINE' (callout 1) showing tasks for 'Hireng Name & Logo' across five business days. A task card is highlighted with a red '2'. A 'COMPLETED' button on the task card is highlighted with a red '3'. On the right, a 'THE TEAM' list shows team members, with Eleni Dimou highlighted by a red '5'. A 'TEAM BREAKDOWN' table (callout 4) is shown at the bottom left, listing team members and their hours. A 'User Info' modal for Joe Zeoli (callout 6) is shown at the bottom right, displaying contact details. A 'Notifications' panel is visible in the top right corner.

Team Member	Today's Hours (2/22/23)	Hours For the week (2/22/23 - 2/28/23)
Eleni Dimou	6	21
Gary Kopervas	6	21
Jess Eversmeyer	6	19
Joe Zeoli	6	13.5
Kevin Hammond	9	37
Lindsay Tweed	3	14
Shaun Crump	6	28
Tracey Williamson	9	33

1 Timeline
Gives a view of last 5 business days
Will show tasks even if archived

3 Mark Tasks as Complete
Drops down to bottom of day and grays out
Will also be visible in status screen

6 User Info
Ability to click and see user's contact information

*Estimate is based on a blended rate of \$115 across 20 resources x 1 hour per week