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Recommendations for Process Improvement

Media Department Projects for Prentice Hall

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Summary

Recently, there have been some workflow issues with projects pertaining to commissioned services for nSight's client, Prentice Hall (PH). The work being managed by nSight is primarily centered in the Media Department. The following is a discussion of the issues at hand and a series of recommendations on how to resolve them.

nSight is committed to providing the highest quality of work and deliverables in a timely and efficient manner. However, under extraordinary circumstances even the best organizations may face various shortcomings that can be perceived as a lack of Quality of Service. nSight's reputation for a high-degree of QoS is being marred by a number of external and internal factors that can be readily remedied given enough berth and direction to do so. However, no amount of scrambling, placating, and fire-fighting can alleviate an implacable client who refuses to see the bigger picture and is mired-down in their own micro-management processes.

The purpose of this document also includes a discussion on not only workflow issues, but also management issues and resolutions. To that end, an objective critique of both nSight's shortcomings and PH's confrontational approach to working effectively with agencies must be examined. This document is for **internal review only** and should not under any circumstances be distributed to Prentice Hall.

The chief issues, as defined by PH, concerning nSight are:

- Mismanagement of projects either due to lack of training, experience, or resources.
- Lack of following proper procedures attributed to the same as above.
- Milestones missed, and projects falling behind schedule or going over budget.
- Follow-ups with vendors and key PH staff are not being made.
- Inadequate preparation for status meetings with PH which includes improperly updated status reports sent to PH prior to meetings.
- Invoicing PH for work not yet completed.

The chief issues, as defined by nSight's Media Department, concerning PH are:

- Hostile client to agency relationship with a lack of respect and professionalism in dealing with issues.

- Micromanagement taken to the extreme, e.g. continual status report updates, copious emails and follow-ups, and massive amounts of details that are not being delegated to the proper resources at the proper times (in other words, spending too much time getting answers on things that can wait just to please the client).

- Improper escalation of issues derailing a positive workflow environment.

- Lack of payment for work in process, net terms and commissioned work fiscal remittance needs to be redefined.

- Nebulous life-cycle of products not clearly defined.

- Non-existing codified management and workflow (between entities) processes that have been defined.

- Insufficient training and assimilation time of workflow procedures not defined as stated above.

- Communication and data channels need to be redefined, e.g. too much email bogging down the workflow environment, too many status reports being generated detracting from actually getting any work down, and convoluted data repository environments for routing and promoting content and materials.

- Lack of in-house resources to effectively manage the entire workload—a situation that is being addressed and improved at the time of this writing.

As you can see from the above points, there are issues on both sides that need to be resolved. The question then becomes, how does nSight succeed in moving past assigning blame and providing the QoS that we are know for?

The discussion in the next section will deal with the first and foremost issue that needs to be resolved, concurrently along with more task management oriented procedures that is, improving our business relationship with PH.

Client Relations Management

Probably the most detrimental effect on the workflow environment for nSight's Media Department has been the poor relationship that has been fostered with PH. This issue has to be directly addressed or no amount work done for them will satisfy them. Hostile client/agency relations is a direct result of poor communications, lack of understanding, and a lack of codified and agreed upon procedures and management processes (including reports, specified content, deliverables, and communication mediums such as email). Without vigilance, a good working relationship with a client can quickly turn sour and cause all kinds of business problems up to and including the discontinuance of commissioned work or ending the business relationship all together.

The situation between nSight and PH has spiraled out of control as evidenced by the pulling of four projects from nSight by PH. Had there been a better working relationship with PH, along with other improvements to be discussed later in this document, this situation might not have manifested itself into such a drastic course of action that foretells of a further disintegration of professional relations between nSight and PH.

How then do we improve this professional working relationship in order to foster a positive working environment and continued business opportunities between both organizations?

The following steps should be taken in order to do just that:

nSight should take a cue from the Advertising industry or Fortune 1000 companies when dealing with hostile clients. The chief tenet of this interaction is “not” to bend over backwards to please every capricious whim of the client no matter how justified they may think they are in their demands. Simply throwing ourselves on the mercy of the client (with endless work and saying “yes” all the time) is not going to solve our diplomatic problems with PH. We have to stand up for ourselves and “push back” against constant verbal and professional abuse. In other words, we need to say “no” to PH sometimes.

Why is this so important? Because we will never get ourselves in a position to be able to tell them to take their business elsewhere while being constantly under their relentless scrutiny being set up to fail for their own jockeying for power over us. Here are some recommendations from Donald Trump on this topic (paraphrased from his book, HOW TO GET RICH):

- Be a General. Lead by example and take charge of the situation, and do not let other’s walk all over you.

- Don’t equivocate. Trying to please a business partner with wishy-washy decisions will not solidify your position. Say “no” or “no deal” when you know that you’re being unfairly treated in a deal.

- Manage the person not the job. Command of any business situation is about people, not processes. If you’re dealing with a hostile business partner, learn to negotiate their strengths and weaknesses for your benefit.

- Keep your cards close to your chest until you are ready to deal. If a hostile business partners knows all of your strengths and weaknesses they will not hesitate to exploit them.

- Make sure everyone comes out a winner. That basically speaks for itself, but it is this point that I want to address more thoroughly.

Recommendation One

A **Face-To-Face** meeting with PH is not only warranted, but necessary in order to save this business relationship. The Director of nSight’s Media Department/Editorial Services Department, the Senior Media Project Manager, and the relevant Project Managers (including the Interactive Media Project Manager and the Webmaster/Project Manager) need to travel directly to PH’s headquarters in New Jersey, and deal directly with Nicole Jackson, Kathleen Schiaparelli, all relevant project Media Editors, and other key PH personnel.

Only and remote-site visit with the client "in person" is going to effectively begin repairing this business relationship. No amount of conference calls or copied emails is going to do what true live interaction will accomplish. Only a real "show of force" is going to represent nSight's true commitment to providing the QoS that our reputation warrants. Also, a live meeting will accomplish several other key resolutions:

- A real codification of the management and workflow processes that occur between nSight and PH.

- Approved and agreed upon document formats, media formats, and other relevant deliverables based on standards and not guesses or out-of-date versions (like the Bruice IRCD).

- A chance to put a human face to the work that is going on and to the issues trying to be resolved. Hiding behind email and conference calls are a badly veiled form of impunity when castigating the other party. Only a real "in-person" meeting will help to diffuse existing tensions between parties—and may be even build positive professional rapports between the parties that will only benefit the businesses.

- And finally, meeting the people behind the problems in their home turf will show PH nSight's quality of character that we're brave enough to go all the way down there to get the job done right.

I do not make these assertions lightly, nor am I unaware of the time and expense of such a venture, but I do know that in any business environment you can only go for so long working in a virtual space or a vacuum. I have worked in advertising agencies, technology conglomerates, and even now publishing enterprises, and the one thing they all have in common when dealing with hostile clients is the "all hands on deck" face-to-face meeting to get things on the table and straightened out. There is no substitute for this.

This investment of time and money is vital if we want to save this relationship with PH and continue to effectively work with them. Otherwise, the next conference call may be a pulling out of business all together, because I can assure you that they are certainly "keeping their cards close to their chests."

Recommendation Two

Saying **"No"** to PH's incessant micromanagement. Micromanagement is the bane of all companies workflow processes. Jumping through hoops to get reports continually updated, follow-up on every little detail that is not necessary, and drowning in communications is the worst way to get things done.

What we need is a better way to do things: that is called a "change management process."

The best example I can give is the ISO 9000:2001 Certification. To put it succinctly, any company that is ISO 9000 compliant and certified has in place Internationally recognized standards of business practices that are highly rated for following benefits (not all apply to nSight and the work we're doing for PH):

- Marketing advantage - increased business

- Improved utilization of time and materials

- Improved efficiency and profitability
- Increased customer satisfaction
- Consistent quality and timely delivery
- Valid test data that the customers can trust
- Improved control of quality, processes, and demonstrations of staff competence
- Fewer re-analysis of samples
- Improved performance from suppliers
- Responsibilities of personnel clearly defined
- Documented system provides useful reference
- Lower reject rates, rework, and warranty costs
- Improved control during periods of change or growth
- Improved records in case of litigation

These are simply examples of "change management processes." I'm not advocating that nSight should commit itself to the time and expense of becoming ISO 9000:2001 certified (which takes about two years at a cost of tens of thousands of dollars) at least not right now, but what I am advocating is that with the provisions set forth in Recommendation One, we can more effectively withstand any criticism against our QoS. But more importantly, we have to stop being so micromanaged. We can not get anything done if we're spending all of our time responding to every email that comes up, and putting out fires.

The solutions to this situation are relatively simple:

1. Abandon email as the primary mode of communications for workflow tasks and issue resolution. Businesses for thousands of years have gotten by just fine without it. Any business magazine will tell you that email, instant messaging, and other modes of "pseudo-real-time" communications are a distraction at best and a hindrance at worst. Scrolling/searching through hundreds of emails to find answers is one of the most inefficient ways to work. Email should not be a crutch, it should be a supplemental resource when all others workflow modes have been tried.

2. Implement an online collaborative workflow environment. In other words, let's get EMC Documentum's eRoom for the Web Team in place now! Waiting until Q2 (April 2006) may be too long to wait while the fires are burning now. I have proselytized the virtues of using this dynamic resource. Houghton Mifflin has invested a lot into this simple compact and robust solution that is working them and their customers. Five client licenses would only cost about $1000.00 but the ROI would be more then double that. Here's I how justify that:

    a. Email takes up nearly 60% of my time. If a PM is costing nSight $25 per hour and 60% of that time out of a 40 hour week is 24 hours the cost of a PM's time dealing with email for one week is $600.

b. Now take a $280 client license for eRoom multiply it by five users (say, me, Aaron, Nicole as a guest, the relevant media editor for a project, the relevant vendor for a project, and you) that's $1400. However, everyone is working in this collaborative environment that we host, and all the materials, project status trackers, and project promotion cycles are located in one place, then the need for emails have been all but eliminated.

c. Within one month for one PM "email glut" will cost the company $2400 (4 weeks of 60% email time). But with eRoom the flat fee of $1400 for key project personnel saves the company $1000 per month. Sure there's time spent in the eRoom, and there's development time, training time, and other minor considerations, but in the long run, eRoom will save the Media Dept. money and our workflow a ton more than depending on email.

3. In lieu of the eRoom, we can set up online status reports as a subdomain of nSightworks.com. Olivera and I have discussed a way to get the status reports linked to the spreadsheets to appear on a webpage that we can send a link to PH when they are ready on a weekly basis. She must agree to that format, and we must insist on it and the weekly cycle. No more scrambling to get daily status reports to her at her leisure. Once she has approved of the design and content of the status report as per Recommendation One, then she has to abide by it. I would go so far as to put in a written agreement. The online status reports can easily be printed and there will be archival links to previous reports. The advantages are:

   a. Dynamic reports that we can update collaboratively.

   b. Easy transmission of reports: simply a link.

   c. Easy formatting of reports, especially for printing.

   d. Scripts can be run to flag us for any lapsed dates on the reports.

   e. A solid weekly cycle that frees us up to work on other higher priority issues that would then be included on the reports.

   f. The ability to make changes to the reports remotely, such as when any of us are off-site or working from home.

   g. We can include any summary information on an additional web page that can contain archival info that will be easier to manage.

4. Finally, using email should be set as well to certain standards. I agree with the subject line convention set by PH, but I would take this a step further:

   a. Have our email server administrator create filters to automatically place emails from PH into relevant public folders for all of us to access—reduces the "not being copied" on emails issue. Also, this places the necessary follow-ups and attachments in a place where everyone has access to them.

   b. Have our email server administrator create mailing lists for each project. Instead of the PM trying to keep everyone in the loop, those who are supposed to be kept in the loop will redundantly be copied on the emails by default if we sent messages to the relevant mailing list as opposed to individuals. These can also be copied to the correct public folder after being sent (or as part of the mailing list).

c. At John Hancock Financial Services we used "canned emails" that contained all of the "agreed upon" relevant information for a workflow task. As part of Recommendation One, we should set up "canned email templates" that we all can follow so there will be not ambiguity as to what is being sent or addressed.

d. Color coding flags. Another convention that should be adopted is using color coded flags. Here's what I use: Red = Follow-up On Query, Etc.; Blue = Content (such as editing a web page or uploading XML in WPS); Yellow = Proofing Task.

e. Conclusion, if we're to rely on email for the time being, let's optimize its use.

5. Re-evaluating the workload and determining what resources we can utilize to best handle it. Here are some examples:

    a. Rachel – is doing proofing work right now. She should be trained to take over production work in HTML (as she has expressed an interest in that type of work). There's a training class here at nSight that can get her started in March 15, 2006. She should also be trained to use WPS to do minor edits and perhaps content uploading.

    b. Out of the 8 remaining PH projects, Aaron, Olivera, and I should discuss how we can best distribute the workload so that there will be a reduced need for extra help.

    c. A Junior PM (JPM) should be brought on board ASAP. My logic for this is such:

        i. The learning curve is very steep here and the sooner we get a JPM in here the quicker we can get the up to speed.

        ii. The easier projects like the CW's can be given to the JPM, further reducing the workload.

        iii. We don't necessarily need a full-time JPM. We could go with a: contractor, part-timer, freelancer, or even an intern. We have lots of employment options for this, such as was the case when I first started.

    d. Outsourcing – sounds like a kooky idea, and is not very American by some perspectives, but we can certainly investigate the possibility of shunting off the more menial tasks to external subcontractors. E.g. Juan Montoya and his college friends doing the TeacherExpress work for Michael Drew. There are organizations that we can subcontract to on the cheap to spread out some of this work, and maybe with reducing our overhead we might be able to still turn a profit on outsourcing some PM/Production work. But that's only if and when we get inundated with more PH or similar work down in the future.

In conclusion, we can stave off the detrimental effects of micromanagement by implementing stalwart and comprehensive (and simple) solutions that should help us be able to expand our workload and not reduce it.

The next section will deal with the more technical aspects of process improvement.

Product Management

What we're creating here are products, pure and simple. Regardless of the format in which their delivered, our Companion Websites (CW), Instructor Resource CDs (IRCD), and ActiveBooks are deliverables that under contract we must fulfill to our clients, namely PH. To that end, the complexity of how these products go from say Media Plan to a Live Website or In Stock Media (CD/DVD) needs to be ascertained, comprehended and effectively managed. This is currently done in a variety of techniques including (but not limited to):

- Media Plans and Cost Estimates on MS Word Documents
- Schedules and Status Reports on MS Excel spreadsheets
- Web Publishing System (WPS) Volumes
- Beta CD/DVDs
- Multi-threaded Emails
- CMG Testing Environments
- Multi-tiered Review Process between nSight, PH, and Vendors

These are good measures that have served us well in the past, but as I have said many times to other organizations, "the Internet (and by default any digit media related deliverables) is a dynamic and evolving entity, and any organization that wishes to do business in that arena needs to also be evolving and highly adaptable to keep up."

Therefore, we as an organization that is getting ever more and more involved in the creation of Internet/digital media related products and deliverables needs to take a cue from the software industry and try to emulate what is happening in much larger and similar organizations such as Houghton Mifflin Co.

Three things come to mind immediately:

Recommendation Three

Product Life Cycle

In most software development companies, product life cycles are an essential part of Product Management. Without a clear understanding of how a product begins from say an RFP to a deliverable or a consumer entity, how could any organization effectively manage its development? That's why I agree that we should have full-scale templates, mock-ups, and flowcharts of all the products' life cycle under our purview. This information should be disseminated to anyone, anyone who is involved in any capacity (unless certain restrictions are in order) with the creation, development, marketing, or management of these products: the CWs, IRCDs, and ActiveBooks.

Based on directives and processes developed in Recommendation One, along with advanced work from nSight PMs (already underway), we can create an effective product life-cycle manual and documentation that will serve many purposes, for example:

- Training for new PMs or key development personnel
- Better overall management by knowing whom to call and when
- Clearer understanding of what obligations need to be met from all involved parties

This type of product life cycle can also be digitized and maintained online as well. The aforementioned eRoom would be a good place to start to keep these universally accepted documents and integrated with the dynamic promotion cycle of its Project Status Tracker and Project Promotion Resource.

Currently, nSight PMs are drafting (on Easel Pad handwritten sheets) the first pass of the flowcharts for the product life cycles. After these have been refined to a point where we can utilize them as a template for current and future products, then we will convert the penned media to MS Visio format for electronic distribution and review (which we could prepare for Recommendation One ahead of time demonstrating our intimate knowledge of these processes). From there we should create schedules and status reports (i.e. full-scale templates) based on these life-cycle documents and other supporting materials. We should also have live mock-ups of products at various stages to serve as examples of the development and management cycles.

These could be an indispensable resource to take our QoS to the next level and leave no doubt of how to effectively manage these projects (products).

Quality Assurance

Q/A is one of the next logical steps in the development of software-based products. We have great proofreaders, and CMG does a great job at catching a lot of issues, but I would suggest that we take it a step further. We should have fully trained and designated Q/A personnel to do and internal review of products before we release them to PH. There should be a codified formal process to perform this function, and also a formal “bug tracking” report should be generated for each Q/A process to be reviewed by, The Release Engineer.

Release Engineering

Release Engineering is another essential part of software development. After a formal Q/A process has been conducted, the Release Engineer reviews the relevant reports, sends the product back for more revision or Q/A, and finally signs off on the deliverable (another formal document) to be sent to the client, or to market.

This has the following advantages:

- Completely documented processes for any kind of future defense against wrongful assignations about or QoS

- Secured accountability about how we're handling the management of these projects/products.

- Better internal review and management so as not to miss the things that we're being accused of missing on a continual basis.

- Moral high-ground knowing that we're doing the best job possible for our clients that will only improve our already fine reputation, and instill more confidence in our ability to handle even more work and opportunities as we go deeper into this market.

In conclusion, nSight has had a good track record with Product Management, but is seems to be clear that we need to take it to the next level. With a little investment of time and resources to implement Recommendation Three, we can do an even better job and know that we're completely on top of things without having to incur the criticisms of an implacable client. It has been noted that on occasion we (nSight) seem to know these processes better than PH does. That being the case, they could not cost effectively work with another agency and get the same level of QoS. When we are ready we will know that we can eventually do without them as we take on new clients who are clamoring for us to work with them—that goal can be attained in a relatively short amount of time through great Project and Product Management.

Training

I'd like to mention a quick note about training for the staff, and how important it is to the continued success of the Media Department and nSight as a whole. nSight is in a unique position to offer training to its staff for the benefit of the entire organization for two reasons:

- nSight conducts corporate training for customers on-site here at our Burlington office, on many applications, software development languages, and editorial techniques, to name a few. How convenient is that?

- On 1/03/06 nSight received word that we have won a grant by The Massachusetts Workforce Training Fund (WTF) for training in the following capacities:

    - Leadership Skills

    - Project Management

    - Team Building

    - Fundamentals of Finances for Non-Financial Managers

The latter is very important because it typifies exactly what we need as an organization to grow and evolve, especially the PM training. Companies now are looking at certified PMs to work with in many capacities. With certified PMs working for nSight, that goes a long way to impress current and future clients—we know what we're doing!

A training schedule should be put together for the Media Department that includes:

- Formal PM training for all nSight Project Managers

- A formal suite of requred technical training sessions must be implemented for all production and editorial assistants staffs, including: beginning HTML/XML, proofreading, Q/A procedures, relevant software applications, WPS, other online resources, the network infrastructure (where to find everything on the network), and eRoom (which I have offered to conduct staff training classes myself). Also future training on larger scale content management systems such as EMC Documentum's Digital Asset Manger (in use at Houghton Mifflin which training was required for "all" employees across many divisions), must be taken into account and provisioned for.

- And finally conferences and seminars need to be attended. The company must make provisions to send its employees, especially those in the Media Dept. to relevant events that not only promote the organization, but gives its employees a fresh perspective on what's going on in the industry and what new techniques we could adopt to our benefit. Some events that come to mind are:

  - MITX – The Massachusetts Innovative and Technology Exchange, formerly MIMC (the Massachusetts Interactive Media Council). This organization had to evolve like every one else, and is a great business networking resource that holds many media-related seminars, workshops, and events throughout the year that can directly relate to our business. Membership is required, as I have been a member of this organization in the past, and events costs money to attend, but the benefits are great when this kind of forward-thinking is employed.

  - The Association of American Publishers Conference, being held in New York March 14-15, this year (2006).

  - Microsoft's Tech Ed Conference, being held in Boston June 11-16, this year (2006).

These are only but a few, more research is needed to determine what events would be best for nSight's Media Dept. The point is that we can not stay cloistered in the Burlington office while the rest of the industry is out there conferring with each other and sharing ideas. Not investing in attending off-site business-related events is a sure path to stagnation and loss of opportunities.

And one more quick note about subscriptions to publications. I personally have three concurrent subscriptions to Wired Magazine, Writer's Digest, and Scientific American. I make mention of this because it is through the publications as well as time spent at various Interactive Media related sites that allows me to stay current with trends, technologies, and business practices on my particular professional bailiwick. We should have a discussion about what kind of publications Media staff should subscribe to and provide a stipend to do just that (which many companies I've worked for have provided), or at the very least have one subscription for everyone of various publications, and keep them in-house for staff to read kind of like a research library.

We should also take this a step further and create discussion groups in the eRoom to talk about these articles and disseminate this knowledge to everyone (providing links or PDFs). A knowledge-base is one of the best ad-hoc training resources a company can get involved in. At Thunder House Online Marketing Communications, where I was an MIS Systems Administrator we were constantly being directed to the company

Intranet/Knowledge-base for new and exciting information, and we were each required to give a presentation to the "entire staff" regardless of discipline on our particular area of expertise (e.g. how to create an effective web page, or how to better manage client/agency relations—something I know that we all could use). This even extended to having experts from other industries come on-site and give seminars from everything to effectively managing personal and retirement finances, and how to tell Scottish Whiskey from American Whiskey (with samples!)—okay, the last one may not be relevant, but then again after all we've been though with PH, this may indeed be in order!

I personally think that we've only scratched the surface on the training front. Aside, from specific training to better do our jobs, there needs to be personal and professional growth training for us all. It is good to see nSight taking a lead in that direction, and I think Media can totally help that along.

Conclusion

So there you have it! My total analysis of where we are, and what we should to do improve nSight's Media Department's overall management, client relations, and workflow processes.

I know that this document contains a lot of information to digest, and not all of it needs to be considered or implemented all at one, but I think that we should start thinking about some of these things in order to better position ourselves for future opportunities and optimizing the ones we have right now. And I completely welcome feedback, comments, suggestions, ideas, and improvements to this document. Like the industry, this tome and its ideas should also be an evolving entity.

This document has been drafted with the utmost respect for our organization and department, as well as complete faith in our abilities to excel in this industry and take the entire organization to the next level. I am excited about the possibilities!