



Project management for translators

Enrique Cavalitto, PMP



The Project Management Institute

- The Project Management Institute (PMI, www.pmi.org) has over 300K members and is the main global authority on project management.
- The PMI issues several project management credentials. The most important is that of Project Management Professional (PMP), with over 350K PMPs all over the world.
- The PMI publishes the Project Management Body Of Knowledge (MPBOK), updated every 4 years.



Projects and project management

- "A project is a temporary endeavor undertaken to create a unique product, service or result." (PMBOK)
 - * Temporary: definite beginning and end
 - * Unique: even with repetitive elements
- Project management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements. (PMBOK)
- Project management requires balancing competing restrictions such as scope, time and cost (the triple constraint) plus resources, quality and risk.



Projects vs. operations

- Work in organizations can be generally categorized as projects or operations.
- Operations are ongoing processes that produce repetitive results, while projects are temporary and produce unique results.
- Projects are performed by a dedicated team that is specially assembled and is dispersed once the project is over.



Project life cycle

- A project life cycle is a collection of phases determined by the management needs, the nature of the project and its area of application.
- For instance a project may have 5 phases: feasibility study, design, construction, set to work and acceptance tests.
- Phases are generally sequential, but they can overlap sometimes.
- Transitions among sequential phases involve the transfer of deliverables and represent a natural point to reassess the project and to change or terminate it if necessary.



Project management process groups

- Project management is implemented by means of processes, defined as "a set of interrelated actions and activities performed to achieve a pre-specified product, result or service" (PMBOK).
- A process is characterized by its inputs, the tools and techniques that can be applied, and its outputs.
- Project management processes can be grouped into:
 - * Initiating processes
 - * Planning processes
 - * Executing processes
 - * Monitoring and controlling processes
 - * Closing processes



Initiating processes

- Processes performed to define a new project or a new phase of an existing project.

The main deliverable is the project charter, a document that formally authorizes the start of the project or phase. Initial scope is defined, expenses are authorized and the project manager is formally nominated.

- No project should be started without its project charter.



Planning processes

- Processes required to establish the total scope of the project, define and refine the project objectives and develop the course of action required to attain them.
- The main deliverable for this process group is the project plan, where the plans and baselines are set for each of the knowledge areas.
- It is of paramount importance to plan before starting the execution of activities. The appeal of “starting immediately without wasting time in planning” is the main starting point towards failure.



Execution processes

- Processes performed to complete the work defined in the project management plan to satisfy the project specifications.
- Execution processes include:
 - * Direct and manage project execution
 - * Quality assurance (QA)
 - * Acquisition, development and management of the project team
 - * Distribution of information
 - * Management of stakeholders expectations



Monitoring and controlling processes

- Processes required to track, review and regulate the progress and performance of the project, identify areas where changes are required and initiate the changes.
- Performed in parallel with the execution, these processes include:
 - * Monitoring and controlling project work
 - * Risk management
 - * Change management of project plan and baselines
 - * Formalizing acceptance of completed deliverables



Closing processes

- Processes performed to finalize all activities across all process groups to formally complete the project, phase of contractual obligations.
- Closing processes include:
 - * Obtain acceptance by the customer or sponsor
 - * Conduct post-project or end-of-phase reviews
 - * Document lessons learned
 - * Archive all relevant project documents
 - * Close out procurements



Knowledge areas

- Nine knowledge areas are covered:
 - * Integration: "Summary"
 - * Scope: "What?"
 - * Time: "When?"
 - * Cost: "How much?"
 - * Quality: "How?"
 - * Human resources: "Who?"
 - * Communications: "Clear messages"
 - * Risk: "What if?"
 - * Procurement: "Buying from others"



Integration management

- Processes and activities needed for the proper integration of the project element, including trade-off among conflicting objectives and management of stakeholder expectations.
- Integration management includes:
 - * Develop project charter (initiating)
 - * Develop project management plan (planning)
 - * Direct and manage project plan execution (execution)
 - * Monitor and control project work, perform integrated change control (monitoring and controlling)
 - * Close project or phase (closing)



Scope management

- Processes required to ensure that the project includes all the work required and only the work required to complete the project successfully.
- Scope management includes:
 - * Collect requirements (planning)
 - * Define scope (planning)
 - * Create work breakdown structure (WBS) (planning)
 - * Verify scope (monitoring and controlling)
 - * Control scope (monitoring and controlling)



Time management

- Processes required to manage timely completion of the project, including:
 - * Define activities (planning)
 - * Sequence activities (planning)
 - * Estimate activity resources (planning)
 - * Estimate activity durations (planning)
 - * Develop schedule (planning)
 - * Control schedule (monitoring and controlling)
- Risk management may add time “reserves”.



Time management

- There are several methods for scheduling. The most used are the critical path method (CPM) and PERT.
- The schedule requires balancing resources when parallel activities make use of the same resources.
- There are two basic techniques to shorten a schedule:
 - * Crashing: additional resources are assigned to critical path activities (reduces time but raises costs)
 - * Fast tracking: one or more activities are started before the previous ones ended (reduces time but raises risk)



Cost management

- Processes involved in estimating, budgeting and controlling costs so that the project can be completed within the approved budget.
- Project cost management includes:
 - * Estimate costs by approximating the monetary resources needed to complete the activities (planning)
 - * Determine budget (cost baseline) by aggregating the estimated cost of activities or work packages (planning)
 - * Control costs during execution (monitoring and controlling)
- Risk management may add cost “reserves”.



Quality management

- Processes and activities of the performing organization that determine quality policies, objectives and responsibilities so that the project will satisfy the needs for which it was undertaken.
- Quality is defined as “the degree to which a set of inherent characteristics fulfill requirements” (American Society for Quality & PMBOK).
- Customer satisfaction – understanding, evaluating, defining and managing expectations so that customer requirements are met.
 - * Conformance to requirements: the project produces what it was created to produce
 - * Fitness for use: product or service must satisfy real needs



Quality management

- The challenge is to transform implicit needs into explicit requirements.
- Project quality management includes:
 - * Plan quality: identifying quality requirements and/or standards for the project and product, and documenting how the project will demonstrate compliance (planning)
 - * Perform quality assurance: auditing the quality requirements and the results from quality control measurements to ensure appropriate quality standards and operational definitions are used (executing)
 - * Perform quality control: Monitoring and recording results of executing the quality activities to assess performance and recommend necessary changes (monitoring and controlling)



Human resources management

- Processes needed to organize, manage and lead the project team.
- The project team is created for the project and it is dis-banded when the project ends.
- The project manager must have leadership conditions and be able to motivate the team and manage conflicts.
- Team members usually have a dual dependency from the project manager and from the functional manager.
- Human resource policies are generally defined at a company level and are independent from the project.



Human resources management

- Project human resources management includes:
 - * Develop human resources plan: identifying and documenting project roles, responsibilities and required skills, reporting relationships and creating a staffing management plan (planning)
 - * Acquire project team and assign roles (executing)
 - * Develop project team by improving competences, team interaction and work environment (executing)
 - * Manage project team by tracking performance, providing feedback, resolving issues and managing changes (executing)



Communications management

- Processes needed to ensure timely and appropriate generation, collection, distribution, storage, retrieval and ultimate disposition of project information.
- Project managers spend most of their working time in communication activities.
- Positive communications: The sender is responsible to ensure that the receiver has properly received and understood the message.
- Listening in an active and effective way is needed.
- Good communication enables agreements and the resolution of conflicts.



Communications management

- Communications management includes:
 - * Identify stakeholders and document their interests, involvement and impact on project success (initiating)
 - * Plan communications (planning)
 - * Distribute information to stakeholders in accordance with the communications plan (executing)
 - * Manage stakeholder expectations, meeting their needs and addressing issues as they occur (executing)
 - * Report performance information including status reports, progress measurements and forecast (monitoring and controlling)



Risk management

- Processes needed to increase the probability and impact of positive events, and decrease the probability and impact of negative events.
- Risks are always in the future.
- Risk is an uncertain event or condition that, if it occurs, has an effect on at least one project objective.
- A risk may have one or more causes and, if it occurs, it may have one or more impacts.
- A cause may be a requirement, assumption, constraint or condition that creates the possibility of positive or negative outcomes.



Risk management

- Project risk management includes:
 - * Plan risk management (planning)
 - * Identify risks (planning)
 - * Perform qualitative risk analysis (planning)
 - * Perform quantitative risk analysis (planning)
 - * Plan risk responses. Typical responses to risks are avoid, transfer, mitigate and accept. (planning)
 - * Monitor and control risks: implementing risk response plans, tracking identified risks, monitoring residual risks, identifying new risks and monitoring risk process effectiveness (monitoring and controlling)



Procurement management

- Processes necessary to purchase or acquire products, services or results needed from outside the project team.
- Includes management of contracts and purchase orders and the relevant change control processes.
- Project procurement management includes:
 - * Plan procurements (planning)
 - * Conduct procurements: obtaining seller responses, selecting a seller and awarding a contract (executing)
 - * Conduct procurements: managing procurement relationships, monitoring contract performance and making changes as needed (monitoring and controlling)
 - * Close procurements (closing)





Application example: translation project



- We are contacted by an agency we have no experience working with.
- Contact is personalized via ProZ.com directory search and they explain why they selected us.
- They inquire about a translation job in our language pair and field of expertise. Volume is important. Deadline is tight but doable.
- They send a document for test translation.
- Based on availability we would like to outsource the tasks and to keep risk and project management.



Project life cycle

- We decide to divide the project into two consecutive phases:

- * Phase 1: Feasibility study. Main deliverables will be an offer to customer and a plan to do the job if a purchase order is received.

- * Phase 2: If a purchase order is received, the phase 2 will include the performance of the job and its delivery to the customer.

- This division is arbitrary. It could be possible to define a single phase including the feasibility study and the translation. Two phases look better because there is a kill point between them.



Phase 1 - Initiating processes

- Reception of the customer request
- Preliminary validation
- Preliminary evaluation of our interest
- Preliminary feasibility definition



Phase 1 - Planning processes

Scope planning

- Obtain preliminary requirements (ask questions):
 - * Tools requirements
 - * Trados analysis (or similar)
 - * Discount analysis
 - * Input / output format
 - * Register and language variant
 - * Glossary? Referent for questions?
 - * Partial deliveries?
 - * Payment conditions (time and form)



Phase 1 - Planning processes

Scope planning

- Define scope: assemble all the information received on the job and validate it with the customer.
- Create work breakdown structure: preliminary decomposition of the required activities: translation, edition, terminology, compagination, management, delivery, etc.



Phase 1 - Planning processes

Time planning

- Establish dependencies among activities.
- Estimate activity durations.
- Develop preliminary schedule
- Compare with customer requirements
- In case of significant differences, the alternatives include adding staff, negotiate a new deadline or decline the job.



Phase 1 - Planning processes

Cost planning

- Define preliminary costs, for instance:
 - * Translation per source word
 - * Proofreading per source word
 - * Terminology (per source word or total)
 - * Project management.
- Develop a cost model
 - * Define the rate to offer to each team member, consider a risk contingency and the amount you will keep for running the risk of paying the team even if the customer happens to default.



Phase 1 - Planning processes

Quality planning

- Define policy on terminology and consults.
- Preliminary definitions on style
- Preliminary proofreading criteria

HR and acquisitions planning

- Define potential candidates
- Inform them of the job conditions
- Check their interest and availability



Phase 1 - Planning processes

Communications planning

- Preliminary definition of contact channels for routine and emergency issues, both with the team and with the customer policy on terminology and consults.

Risk planning

- Evaluate customer in Blue Board and other payment practices
- Evaluate other risks, for instance contact additional translator(s)

Integration planning

- Summarize all planning activities in a single folder / document.



Phase 1 - Execution processes

- Perform translation test (on our own or with the team)
- Deliver quotation to customer
- Share limited version of project plan with the customer
- Share limited version of project plan with the team



Phase 1 - Monitoring and controlling processes

- During a reasonable time frame look out for a reply from the customer and keep updated the information with the team, including availability
- Process any change that may have an impact on the project plan.



Phase 1 - Closing processes

- If a purchase order is received, acknowledge receipt and move to phase 2.
- If notification of non-acceptance is received, or if the offer's validity time has elapsed, consider the project killed, communicate this to the team and archive the corresponding documentation.



Phase 2 - Initiating processes

- Upon reception of the purchase order, verify that it conforms to the agreed terms
- Negotiate eventual differences
- If an agreement is reached, send the customer confirmation that we start working on the project



Phase 2 - Planning processes

Scope planning

- Receive and acknowledge the files
- Verify that they conform to the agreed terms
- Negotiate discrepancies found
- Implement the decomposition already planned.

Time planning

- Update the schedule already planned, including real data and more details



Phase 2 - Planning processes

Cost planning

- Verify validity of the costs model already defined.
- Develop the costs template.

Quality planning

- Distribute style guidelines
- Develop the terminology handling system

HR and acquisitions planning

- Confirm interest and availability.
- Update "internal contracts"



Phase 2 - Planning processes

Communications planning

- Create and distribute the plan for routine and emergency communications, both with the team and with the client (what has to be communicated, and how, and when).

Risk planning

- List of risks, prioritization
- Plan of actions and responses

Integration planning

- Assemble project plan. Distribute restricted versions with the team and the client.



Phase 2 - Execution processes

- Send the "internal purchase orders" to the team
- Distribute files
- Implement the planned processes
- Implement the communications plan
- Send the completed files to the customer



Phase 2: Monitoring and controlling processes

- Track, review and regulate the plan execution, for instance:
 - * Files received, translated, reviewed and sent
 - * Level of errors and problems per translator
 - * Conformance to schedule
- Evaluation of new risks
- Change management
- Confirm with client the proper reception of deliverables and their adequacy to requirements.



Phase 2 - Closing processes

- Confirm with client the proper completion of the project
- Deliver invoices
- Settle all numbers with the project team
- Receive payment from the client
- Payment to the project team
- Lessons learned
- Archive all relevant project documents
- Request and provide feedback





Questions?

