



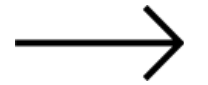
CAUSEIS PRESENTS

Digital Academy for Associations

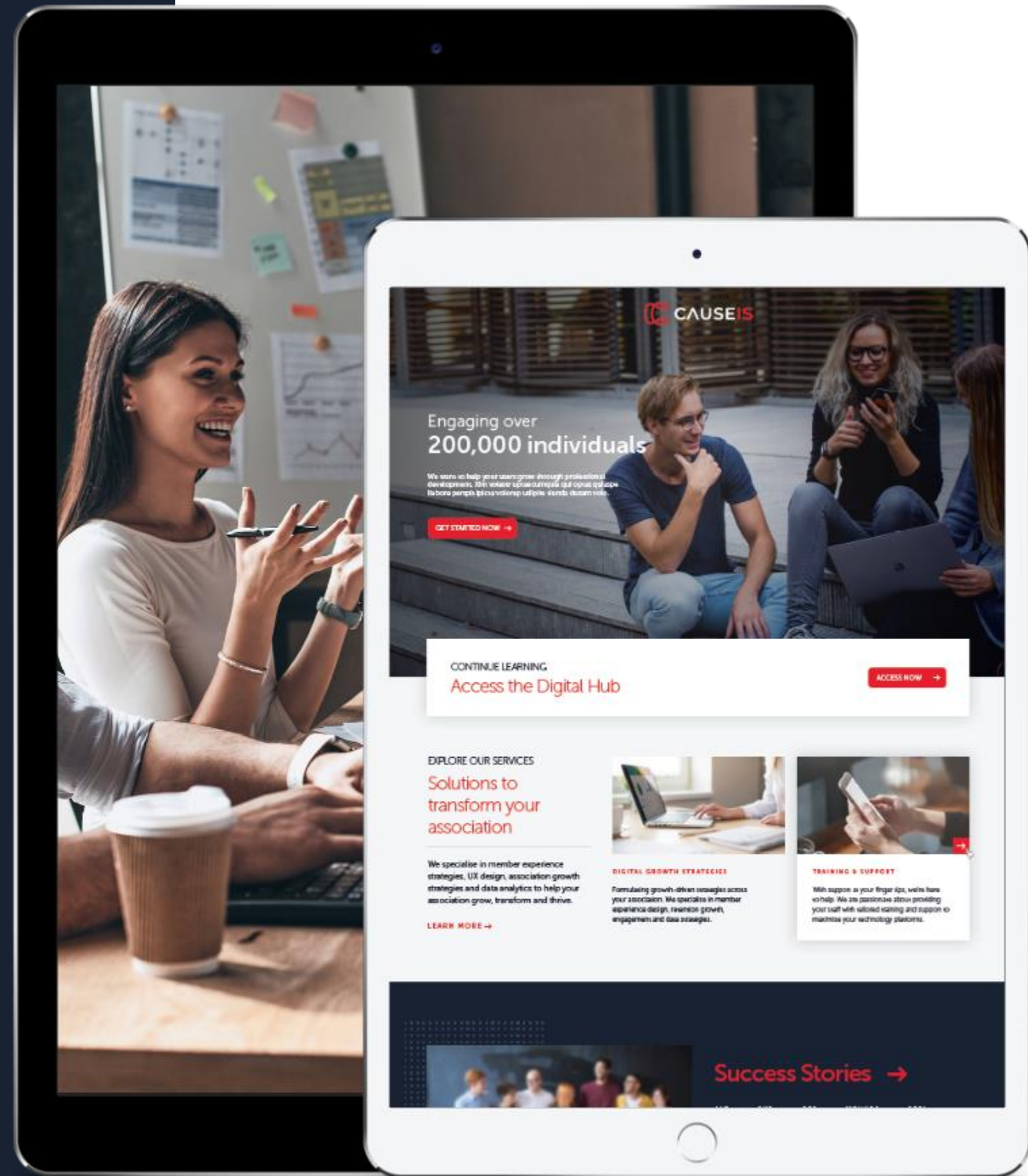
→ Course: Project Management for Associations



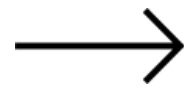
Digital Academy



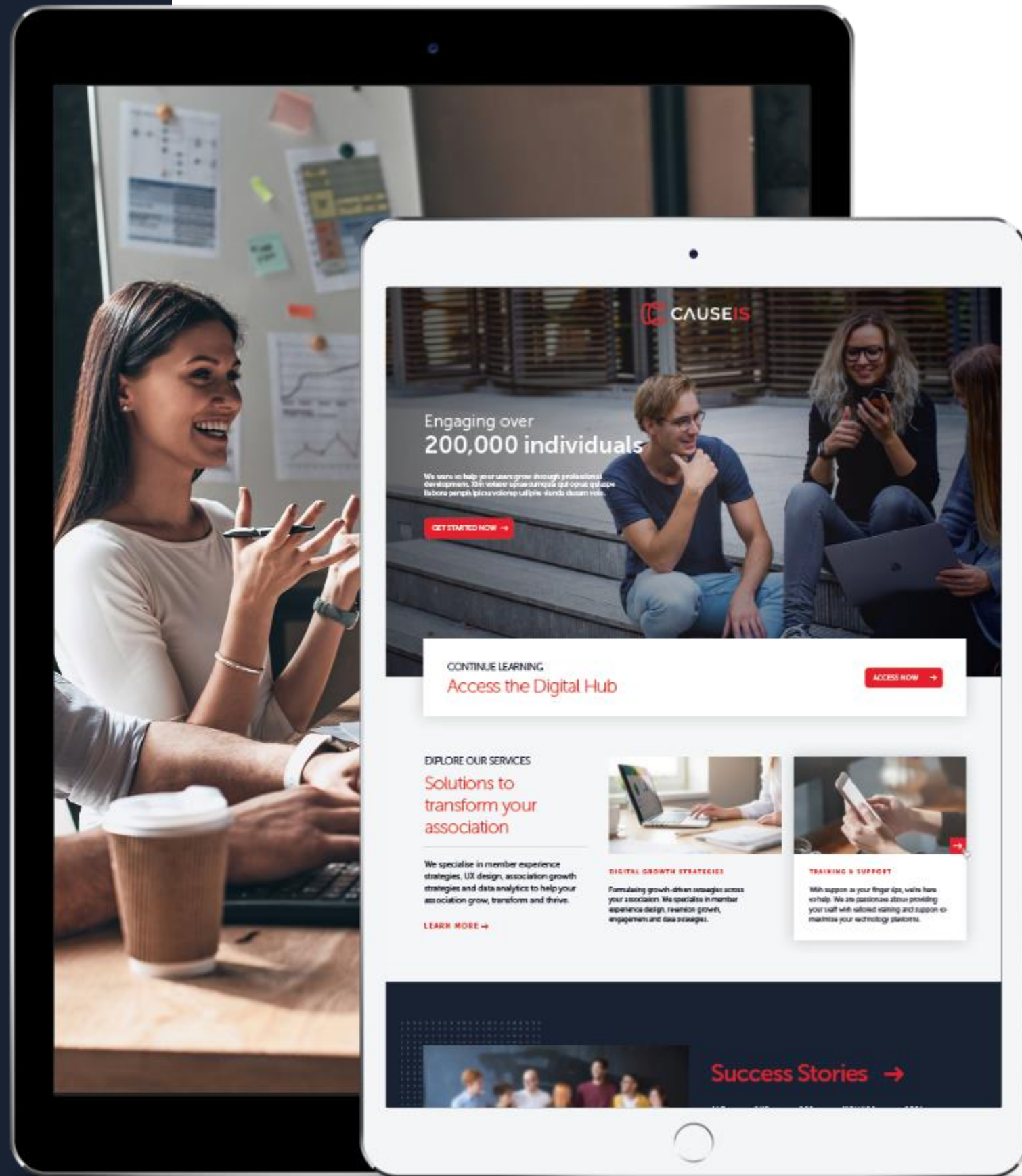
Welcome to the Digital Academy



- Time to focus on your Association Strategy
- Learn from other associations and your peers
- Use Member Experience techniques to shift your strategies
- Consider new culture, innovation and ideas
- Tools and frameworks to help you



About Causeis



Causeis exists to support associations.

We create digital experiences for your members, your staff and your association. Focusing on your growth, Causeis leverages best-in-class technology to enable your strategy and success.

Supported by AuSAE

The home for association professionals.
A place where you belong, connect with others, advance your
career and be inspired.

www.ausae.org.au



Presenters & Facilitators



Michelle Lelempsis
Managing Director
Causeis



Yolande Smith
Digital Marketing Specialist
Causeis

Maximise your Workshop Experience



Mute as required

To allow for clear audio please mute yourself when presentation sessions are in session. At times we may mute your line if you may have forgotten.

Session recording

Today's presentations are being recorded however to maximise you're sharing and networking the breakout rooms will not.

Presentation Slides

Presentation slides and recording will be distributed on course completion.

Chat and engage

Engage your fellow peers through the breakout rooms and the Zoom chat. Share ideas, successes and learnings.

Use your camera

Especially in the breakout rooms, please don't be shy and turn on your camera to increase your engagement.

Update your Name

So that we know who you are, and to let everyone know where you are from – lets rename ourselves to show our full name & acronym

Tuesday 14th June

Day 1: Agenda

- What is Project Management?
- Waterfall versus Agile
- Causeis Project Framework

Member Journey Mapping to Drive Member
Experience for Growth

Let's Get Started

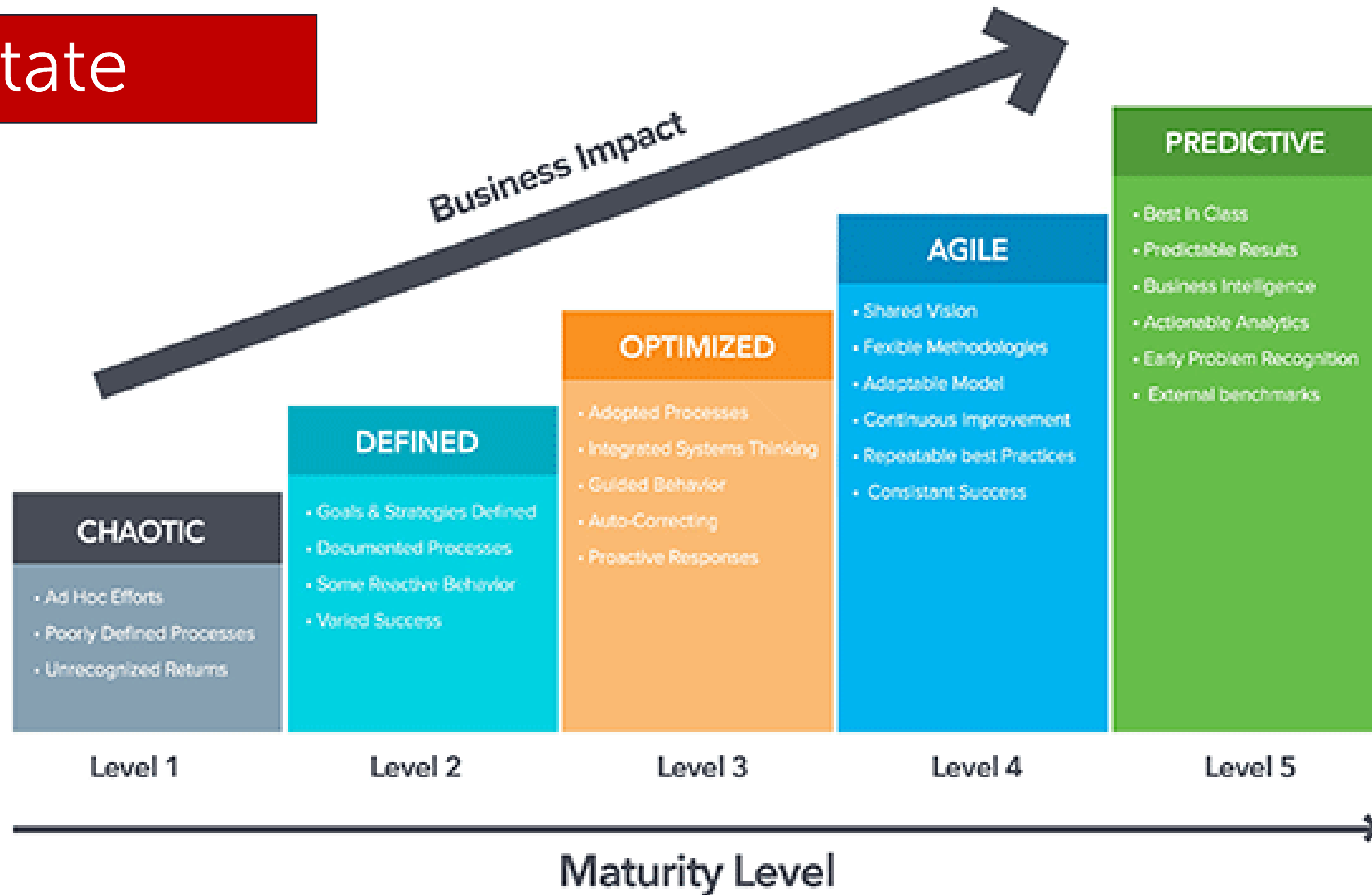
Foundations of Project Management

What is Project Management?

How does your association implement
new projects?

What's your associations current state?

Current State



What thoughts and feelings does the term “Project Management” invoke?

How does your association implement
a new project?

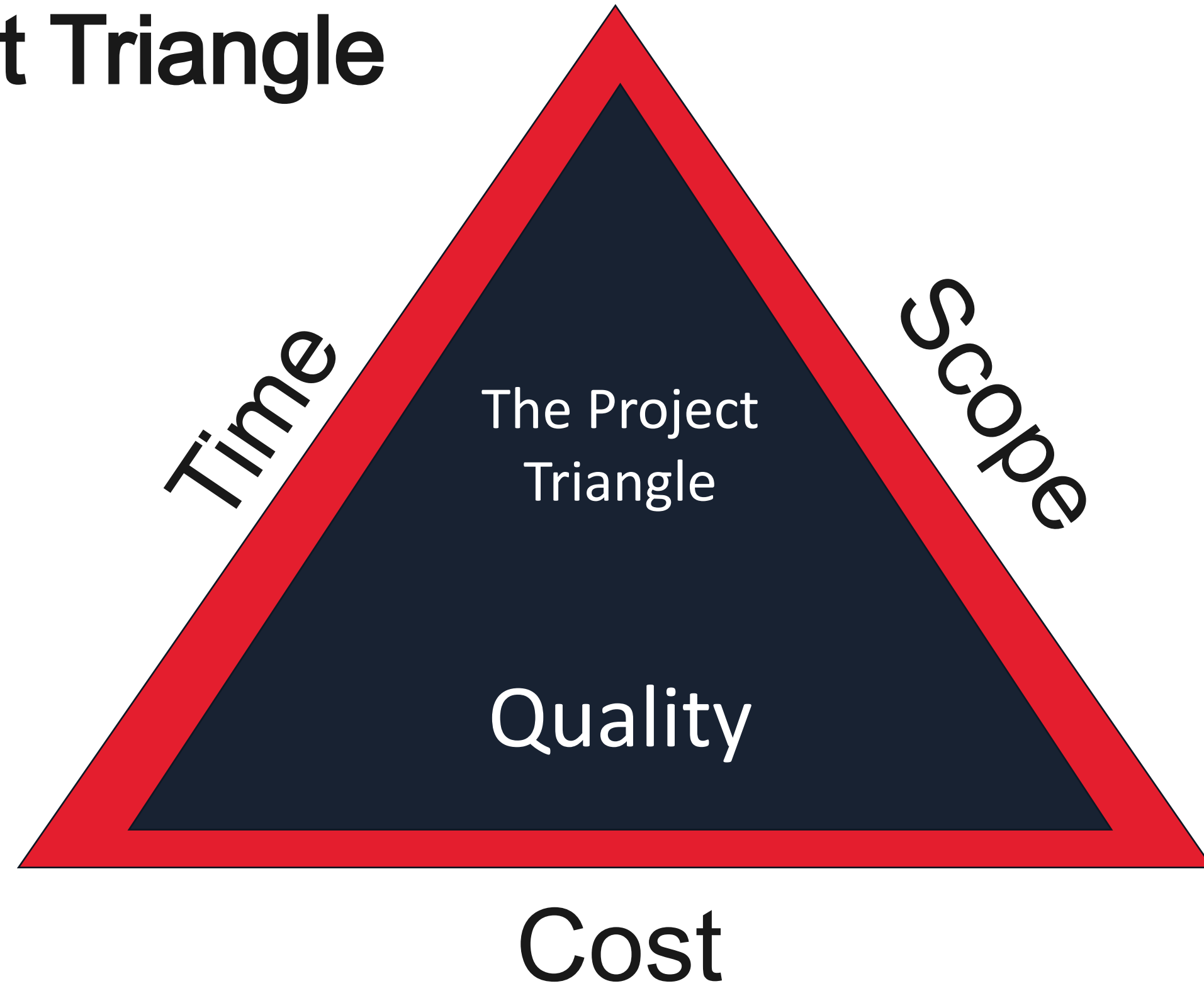
How would you define a project?



The Project Triangle

What factors impact the success of a project?

The Project Triangle



What is Project Management?



What is Project Management?

"Project management is the use of specific knowledge, skills, tools and techniques to deliver something of value to people."

Project Management Institute

<https://www.pmi.org/about/learn-about-pmi/what-is-project-management>



What is Project Management?

"Project management is using tools, methodologies, and skills of team members to meet the project requirements."

Monday.com

Why is it important?



Staff Satisfaction

Well managed projects will allow staff to feel less overwhelmed and contributing to the overall success of the business.



Source of Truth

Creating a project framework will ensure that the project has a reference to guide the requirements and goals.



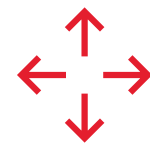
Documentation

The project framework will serve as documentation for the life of the project.



Delivery time

Structure the project to have a realistic delivery time. Enable and prepare marketing, business users and customers to know when to expect.



Change Management

Assist in the effective delivery of change management.



Successful Delivery

More likely to deliver a successful project that is in scope, on time and in budget.



What is Project Management?

"Project management is the use of specific knowledge, skills, tools and techniques to deliver something of value to people."

Project Management Institute

<https://www.pmi.org/about/learn-about-pmi/what-is-project-management>

Key Components of Project Management

PROJECT MANAGEMENT FOUNDATIONS

Key phases of all Project Management Frameworks



**INITIATION &
CONCEPTION**



PLANNING



**LAUNCH &
EXECUTION**



**MONITORING
& CONTROL**



**PROJECT
CLOSURE**

PROJECT MANAGEMENT FOUNDATIONS

Key phases of all Project Management Frameworks



INITIATION & CONCEPTION

PLANNING

LAUNCH & EXECUTION

MONITORING & CONTROL

PROJECT CLOSURE

Define project goals
Create project brief

Project scope & budget
Deadlines
Team roles
Communication plan
Milestones

Budget management
Resource planning
Status reports

Project goals
Quality of deliverables
Team performance

Celebrate
Retrospective meeting
Project closure report



PM Frameworks





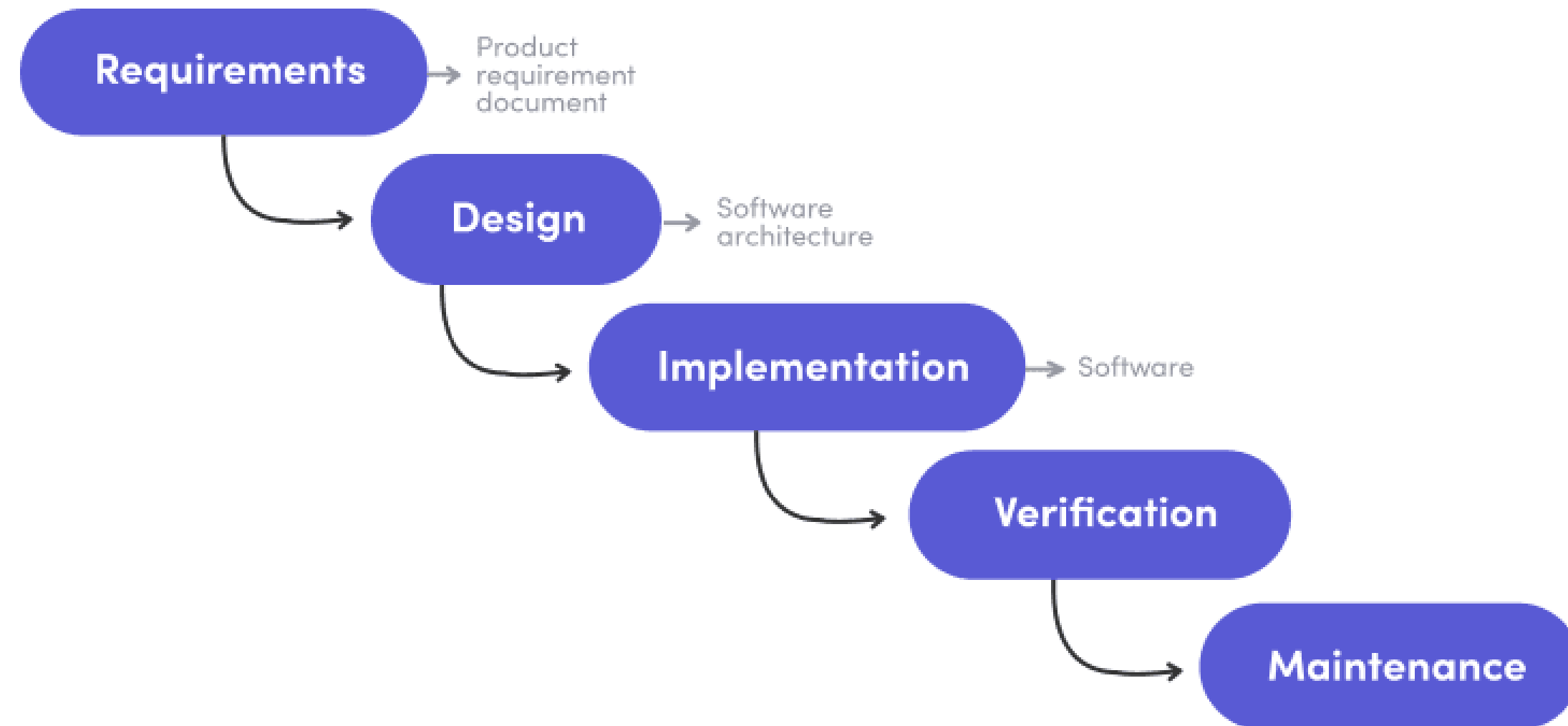
So many Project Management tools and frameworks

- Waterfall - A step-by-step, linear approach
- Agile - An iterative approach
- Or combination



Waterfall Framework

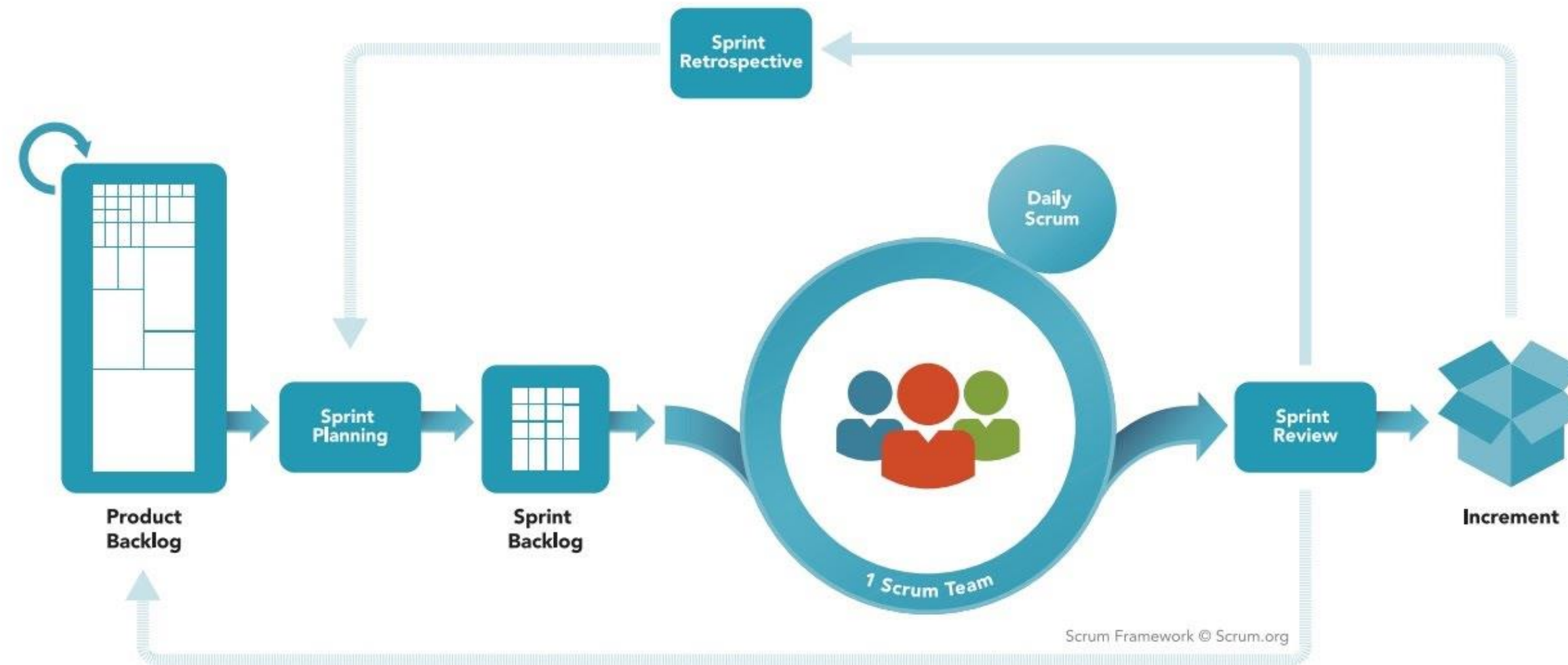
The Waterfall Model





Agile: Scrum Framework

SCRUM FRAMEWORK



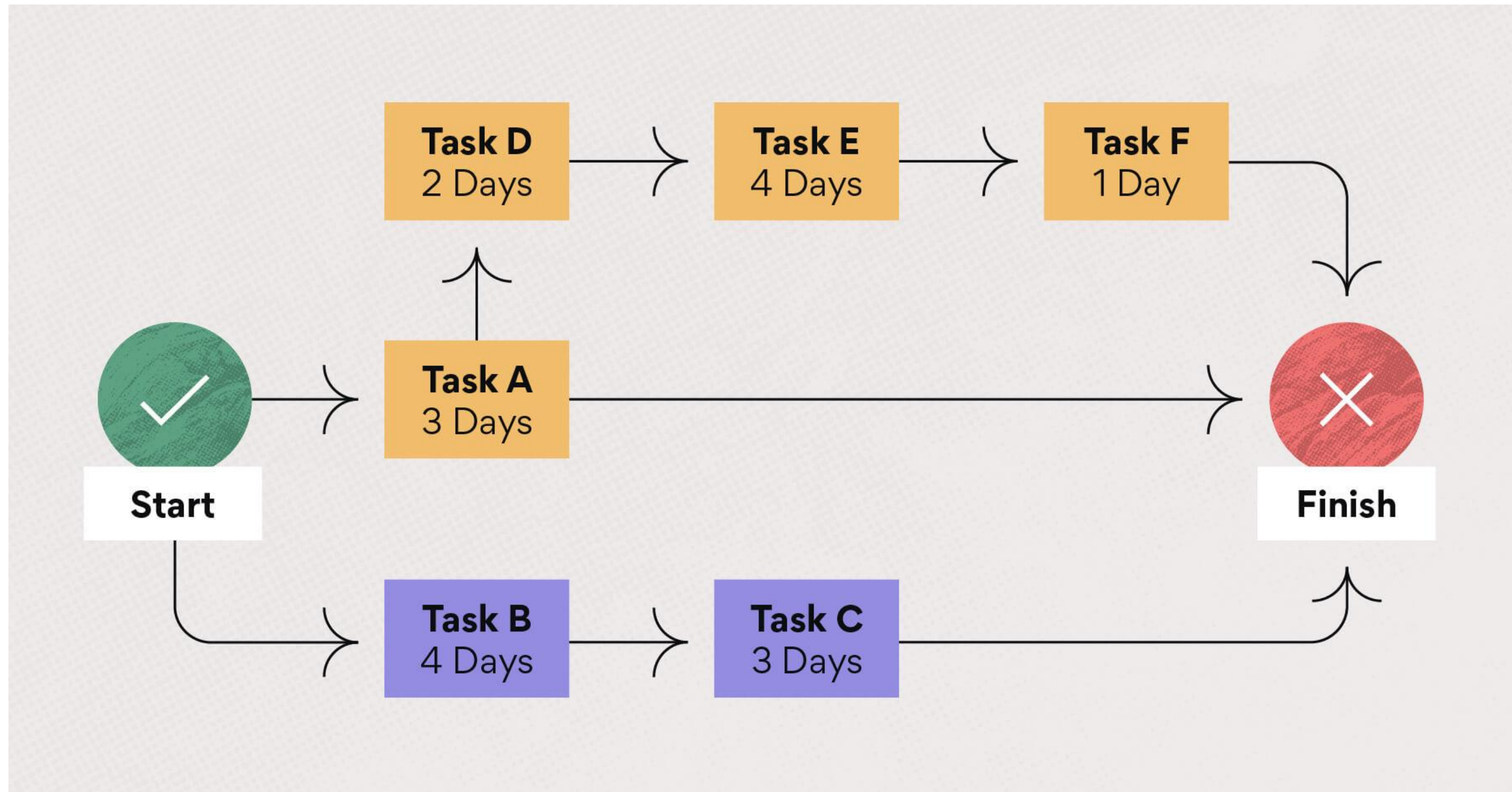


So many Project Management tools and frameworks

- *Predictive*
- *Critical Path Method*
- *Lean*
- *Prince2*
- *PMBok*
- *Kanban*
- *Scrum*



Waterfall: Critical Path Method



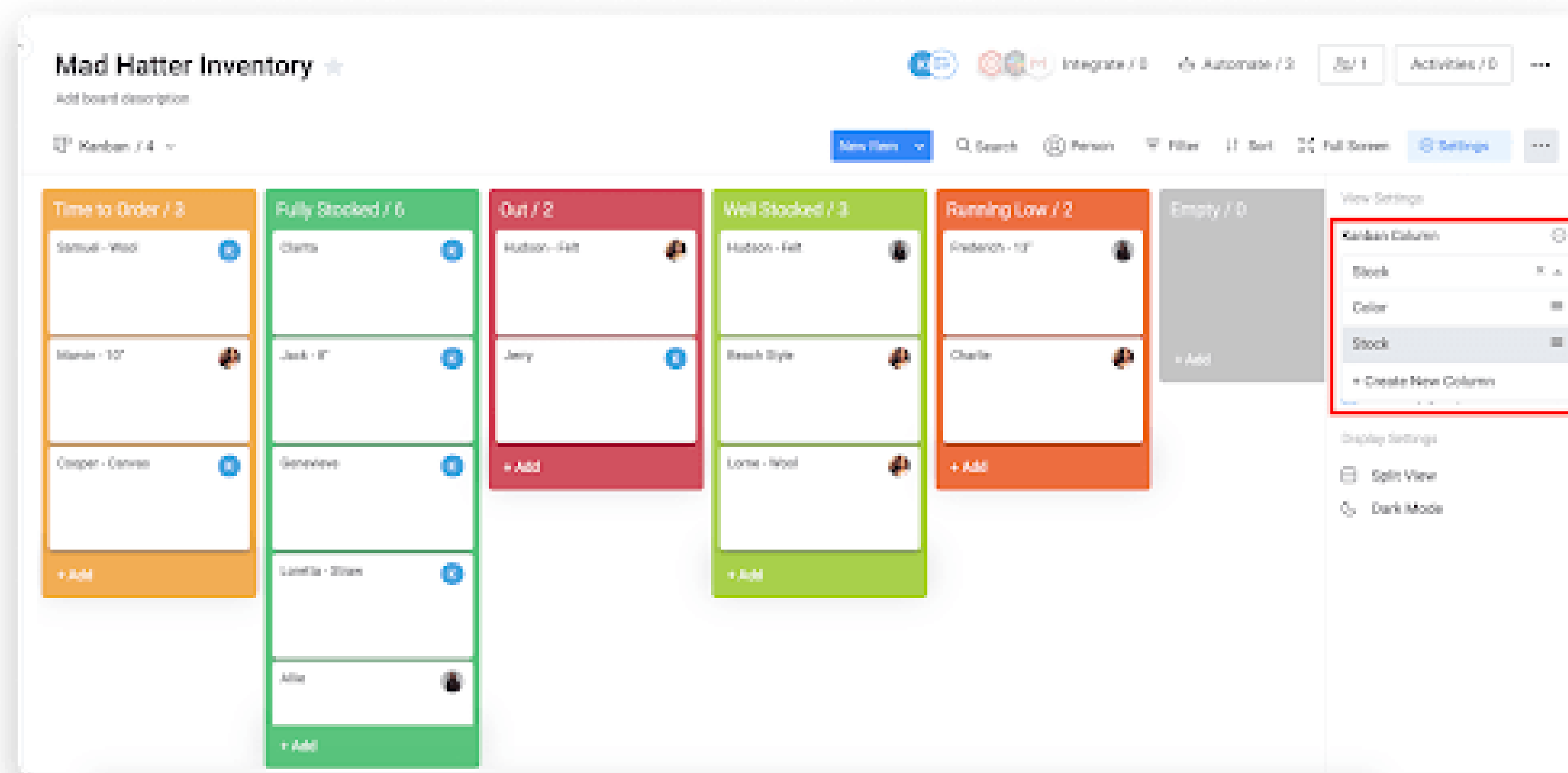


Waterfall Framework: PMBok





Agile: Kanban Project Framework





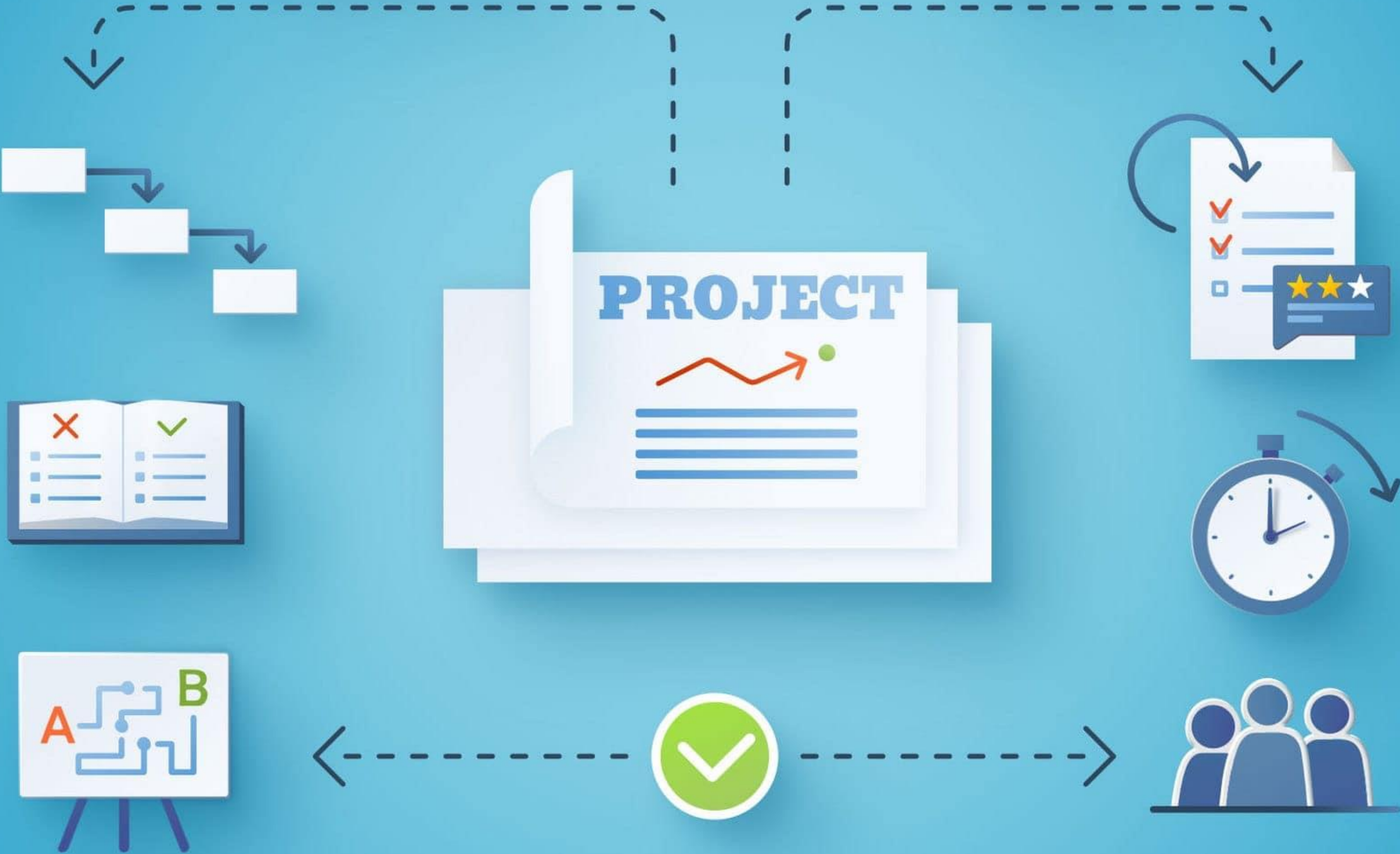
Agile: Lean Project Framework



Waterfall versus Agile

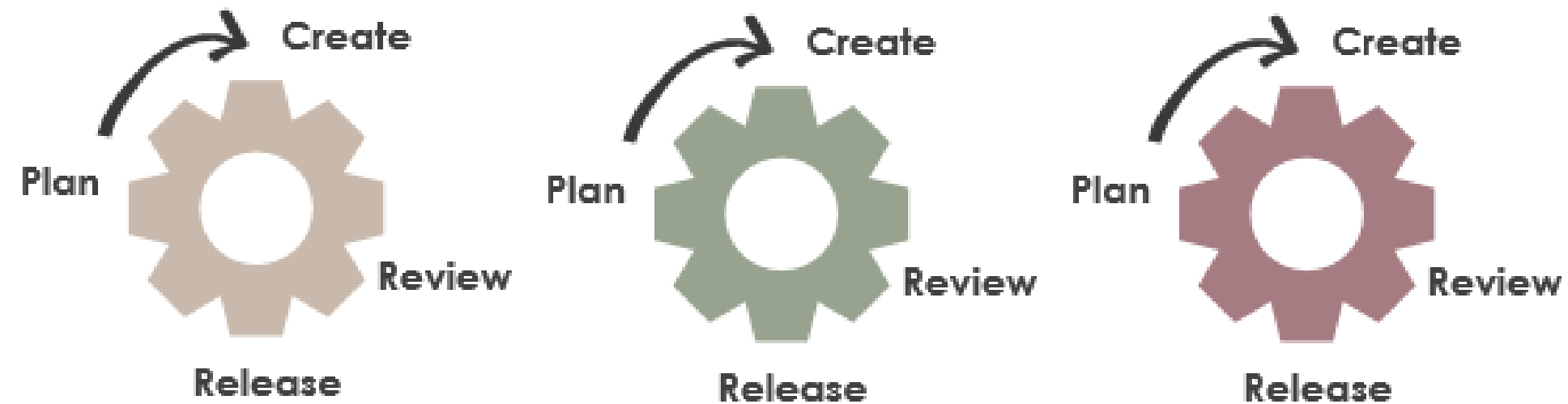
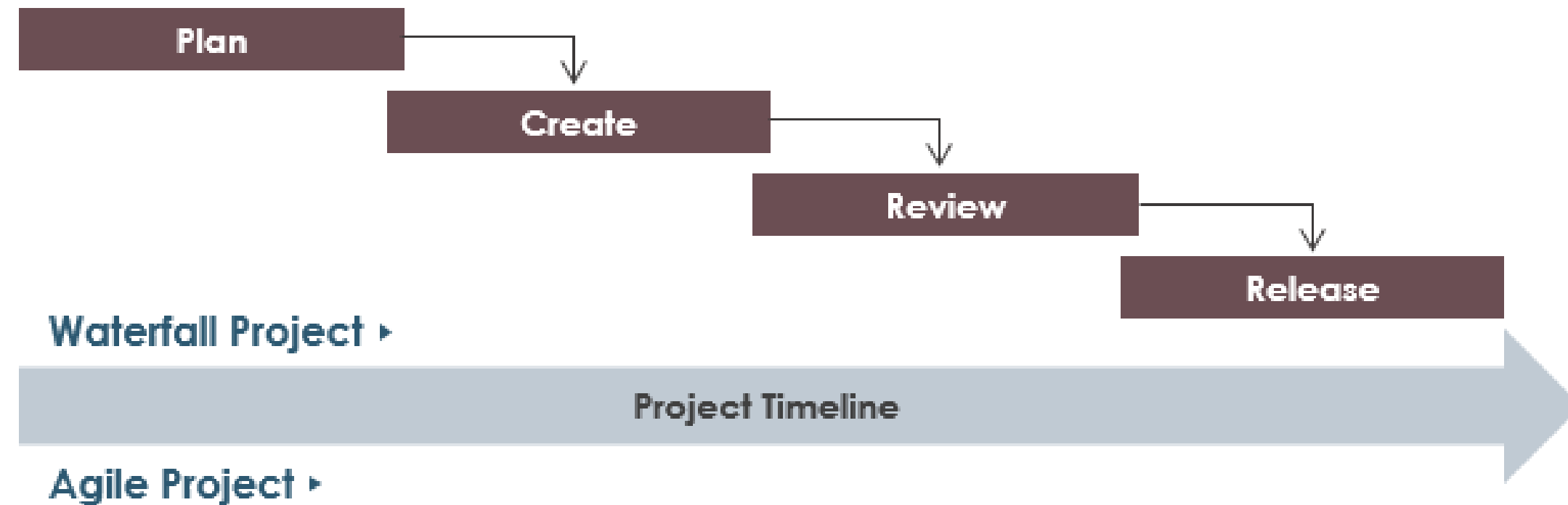
Waterfall

Agile





Waterfall vs Agile





Waterfall vs Agile

Waterfall

Relies heavily on its documentation

Works better with a defined scope

Changes are limited ensuring adherence to a pre-agreed schedule, budget or scope

Client involvement generally only at milestone points

Suitable for fixed budget project

Requirements and Design defined up front

Agile

Relies heavily on its people

Works better with ambiguous scope

Allows change but at the expense of time, cost or scope

More extensive client involvement is required

Suitable for Time and Materials type agreement

Details in Requirements and Design emerge with the development process



Which method is better? Waterfall versus Agile

“Why don’t we have both?”



Waterfall vs Agile

Most of our projects use a hybrid of project management approaches depending on things like:

- Budget/schedule constraints
- Length of the project
- Complexity of the product/features



Let's take a 10 minute break

Grab a refreshment

Please feel free to mute and turn
off your camera

Don't close the Zoom
session

D

A framework for
successful projects.

E



The Big Mac Experience



D

A framework for
successful projects.

E



PROJECT MANAGEMENT FOUNDATIONS

Key phases of all Project Management Frameworks



INITIATION & CONCEPTION



PLANNING



LAUNCH & EXECUTION



MONITORING & CONTROL



PROJECT CLOSURE

PROJECT MANAGEMENT FOUNDATIONS

Key phases of all Project Management Frameworks



INITIATION & CONCEPTION

PLANNING

LAUNCH & EXECUTION

MONITORING & CONTROL

PROJECT CLOSURE

Define project goals
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Communication plan
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Budget management
Resource planning
Status reports

Project goals
Quality of deliverables
Team performance

Celebrate
Retrospective meeting
Project closure report

The Causeis framework for successful projects.



INITIATION



PLANNING



DEVELOPMENT



**VALIDATION &
DEPLOYMENT**



**CLOSURE &
MEASURE**

The Causeis framework for successful projects.



INITIATION

- Goals
- High level requirements
- Priority and timeframe
- Impact Assessment

PLANNING

- Current landscape
- Requirements
- Data, Process & Experience
- Maintenance
- Measure of Success

DEVELOPMENT

- Guiding principles
- Considerations (Time, Performance, Impact)
- Development
- Testing

VALIDATION & DEPLOYMENT

- Documentation
- Communications plan
- Metrics
- End user training
- Post live validation

CLOSURE & MEASURE

- CSAT/MX
- Assess against initiation
- Improvement
- Lessons

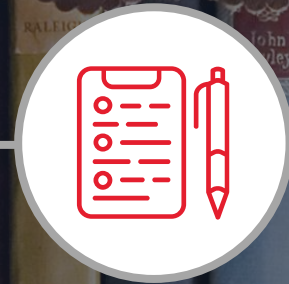
THREE LENSES: MEMBER, STAFF & THE ASSOCIATION

DATA, PROCESS AND EXPERIENCE

Phase 1: Initiation



**INITIATION &
CONCEPTION**



PLANNING



DEVELOPMENT



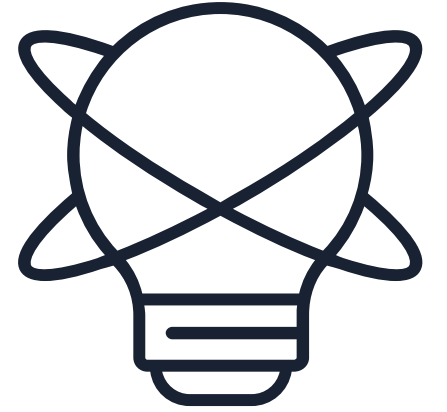
VALIDATION



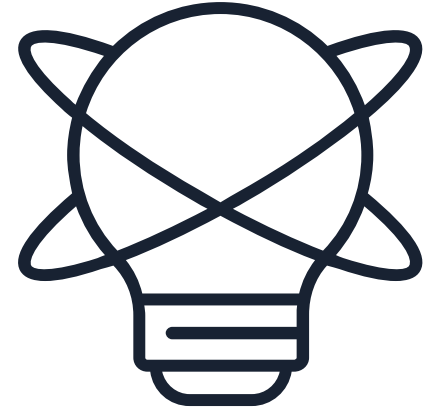
**PROJECT
CLOSURE**



Initiation



- What are the goals of the task?
- High level requirements gathering
- What's the priority and timeframe?
- What's the potential impact and risk?
- Does it require funding or budget?



Goals vs Requirements

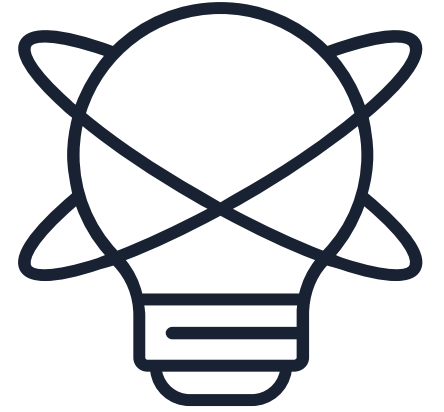
What's the difference?

A goal is an overarching statement that is meant to provide overall context for an outcome of a project. This outcome is a summary statement of the business value of the project.

A requirement is a detailed requisite collected by a project manager from stakeholders through surveys, questionnaires, analysis and other tools to meet a project goal.



Example: Renew Online



Goals:

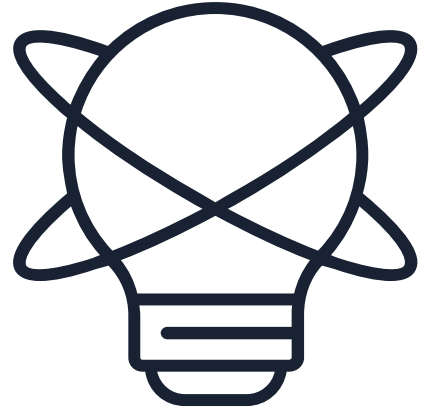
- Easy to use
- Member centric
- Improve cashflow for the organisation
- Lower work requirements for staff

Requirements::

- Ability to download invoice
- New billing rates
- Opt-in to Autopay
- Ability to pay with credit card
- Automation for notifications



Your Turn



Goals:

Requirements::

A close-up photograph of a person's hands holding a camera. The camera's lens is prominent, showing a reflection of the Earth from space. The background is dark and out of focus.

How has the project considered these perspectives / lenses?

Member. Staff. Association.



- ✓ Is it something they would use?
- ✓ Is it easy to access?
- ✓ Does it require a major change to how they do things?
- ✓ Does it add value to membership?
- ✓ Does it encourage them to renew?
- ✓ How will they access it?
- ✓ How will you communicate it?

Member. **Staff.** Association.



- ✓ Does it make their job easier?
- ✓ Does it require change management?
- ✓ Will they use it?
- ✓ Do they understand the reason for the change?

Member. Staff. Association.



- ✓ Does it provide a return on investment?
- ✓ Is there an upgrade path?
- ✓ Will it solve an actual problem that exists?
- ✓ Does it add value?
- ✓ Will it require extra resources to implement or run?



What are the high-level requirements?

The high-level requirements should be determined by key stakeholders.

High level requirements determine the different phases of a project, which can then be broken down into detailed requirements in the Planning stage of the Solution Delivery Framework.



Journey Statement – defining requirements

Registered Member

- ✓ I want to be able to complete my renewal form online
- ✓ I want to be able to upload attachments for my renewal online
- ✓ I want to receive a tax invoice once my renewal payment is processed
- ✓ I want to be able to check and update my details (address, email, etc) on-line
- ✓ I want to be able to request and receive a certificate of currency on-line on-demand



Journey Statement – defining requirements

Staff

- ✓ I want to be able to issue renewal notices on demand, either as a bulk transaction or for individual members.
- ✓ I want their payments automatically reconciled in our bank account
- ✓ I want payments to be automatically allocated to the individual members account. In addition, I need the ability to manually record payments received.
- ✓ I want to be able to track the number of members who have/have not completed their membership renewal.
- ✓ I want to be able to track what stage each member is up to in the renewal process
- ✓ I want to be able to verify the CPD submitted is acceptable
- ✓ I want to be able to issue bulk renewal reminders
- ✓ I want members to be able to self-manage receiving receipts and/or certificates of currency



What's the priority and timeframe?

- ✓ Is the timeframe realistic
- ✓ Do you have the required knowledge, or do other staff need to assist?
- ✓ Are there third parties that need to be involved and how does their timeframe fit in with the project?



Our definition of risk:

Anything that:

- Impacts revenue of the client
- Reputation of the client
- Privacy / Data of the client and/or their constituents
- The reputation of Causeis



What's the potential Impact and Risk?

Risky tasks:

- Automation that is member facing
- Anything to do with billing changes
- Member facing reports and data
- Anything else?



Outcomes of Initiation

Projects:

- Goals are confirmed with the client in a kickoff meeting
- High level requirements are determined within the same kickoff meeting
- Detailed Requirements may not yet be determined
- Estimate is confirmed to be reasonably accurate



Phase: Documentation

Deliverables

- Project kickoff template (Consultant to Client)
 - Project Goals
 - Project Requirements
 - Key contacts



Let's take a 10-minute break

Grab a refreshment

Please feel free to mute and turn
off your camera

Don't close the Zoom
session

Phase 2: Planning



**INITIATION &
CONCEPTION**



PLANNING



DEVELOPMENT



VALIDATION

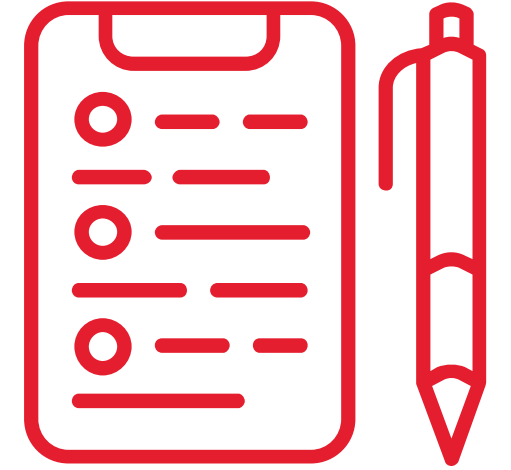


**PROJECT
CLOSURE**



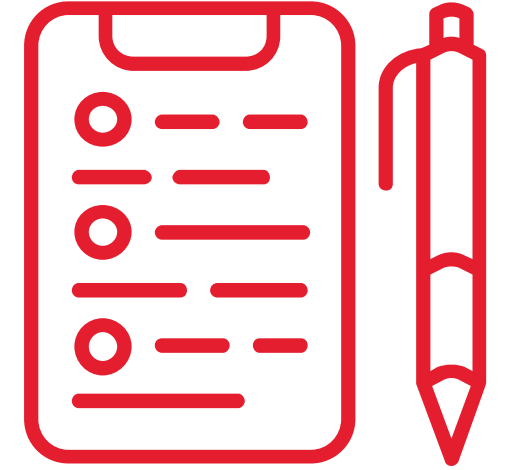
Phase 2: Planning

- What's the current landscape
- Validating Requirements
- Data, Process & Experience
- Future Maintenance Issues
- What will be the “Measure of Success”?





Current Landscape



All projects should adhere to best practice planning:

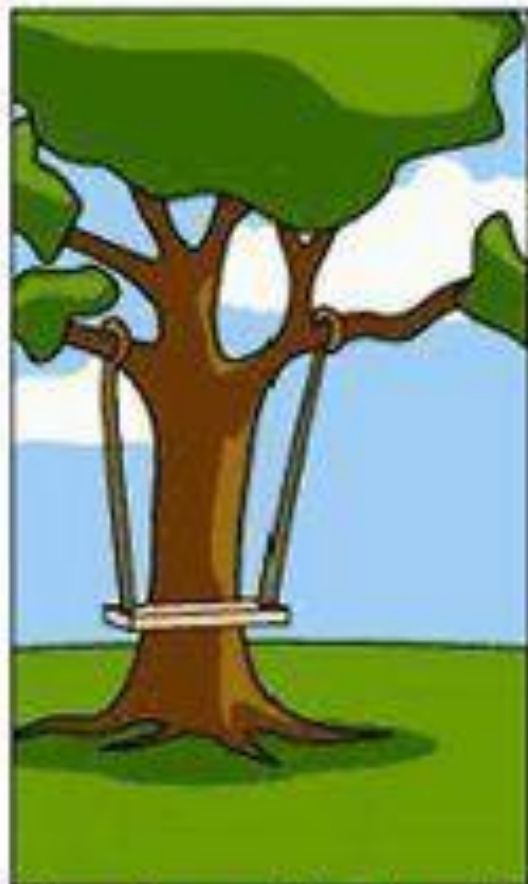
- Appropriate for the business requirements (three lenses)
- What considerations are there for technology, data, process?
- Are there existing proven solutions in our organization or the marketplace?

Do you know your requirements?





How the customer explained it



How the project leader understood it



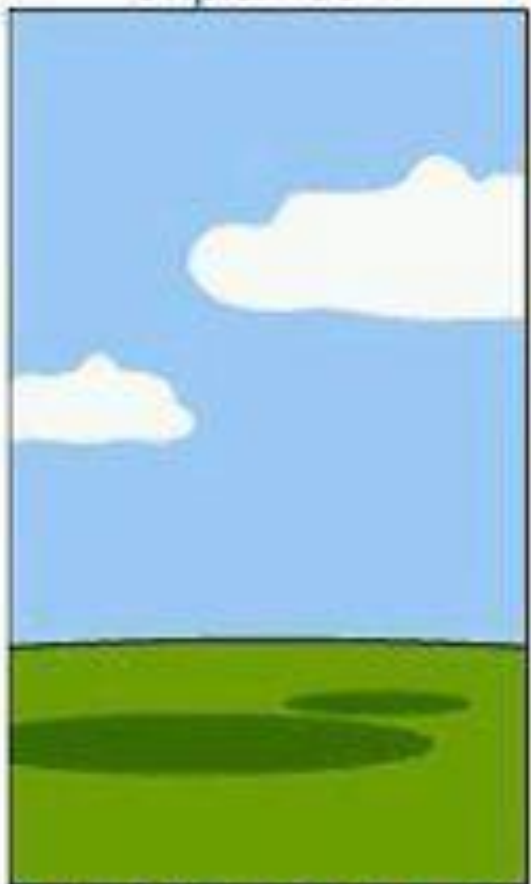
How the engineer designed it



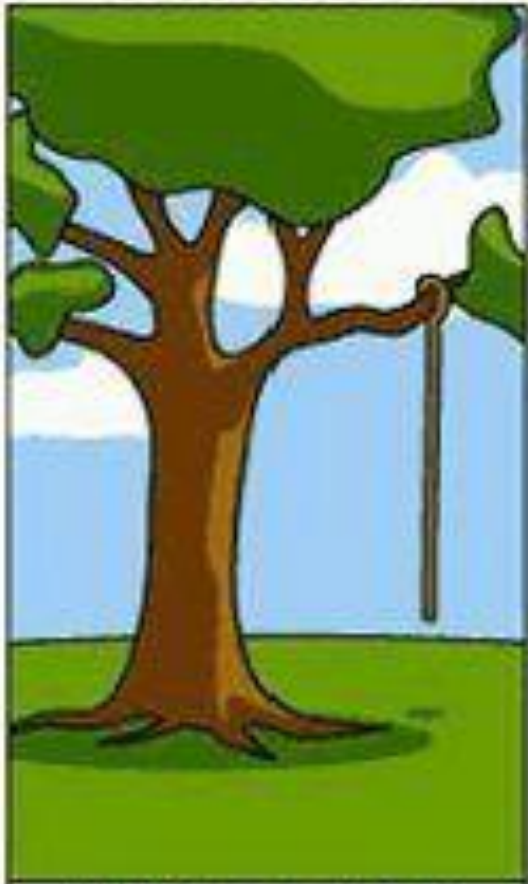
How the programmer wrote it



How the sales executive described it



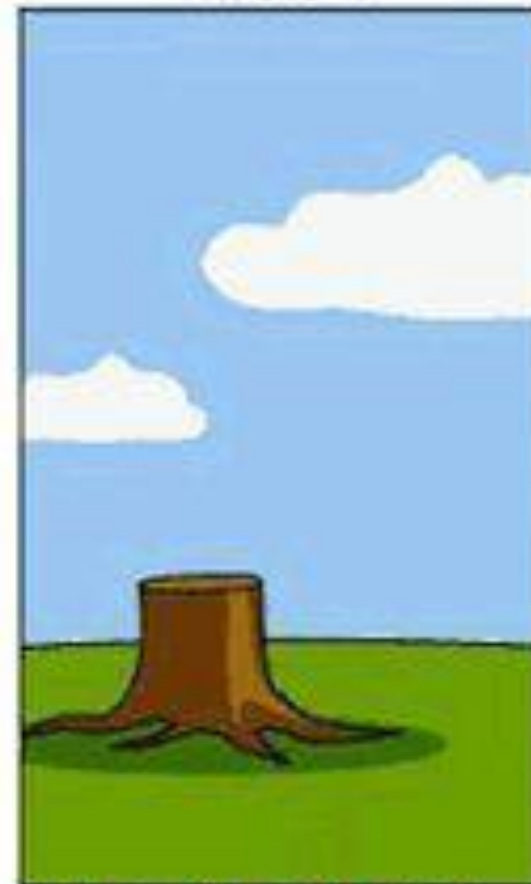
How the project was documented



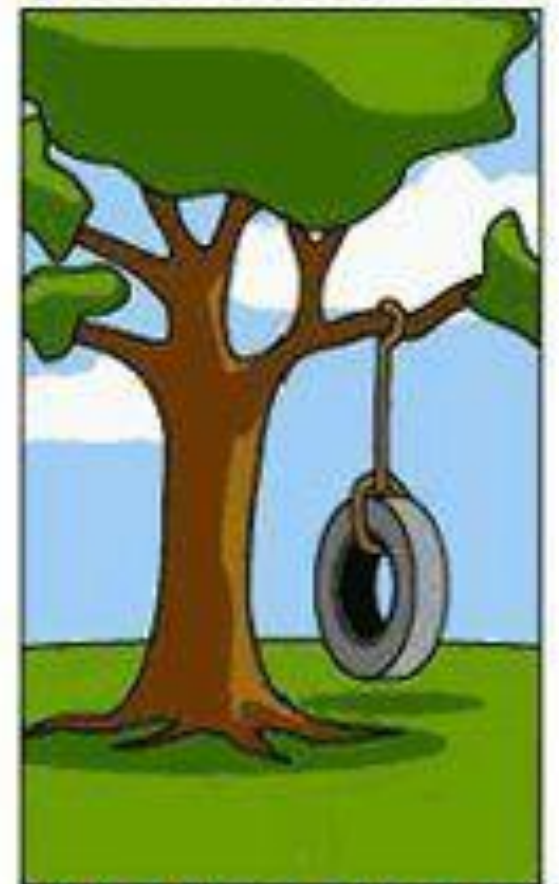
What operations installed



How the customer was billed



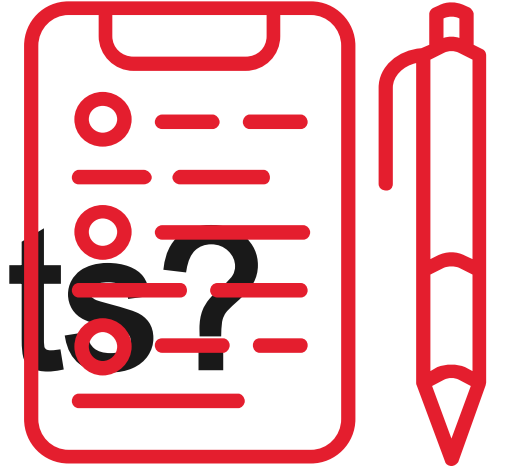
How the helpdesk supported it



What the customer really needed



How to validate requirements?



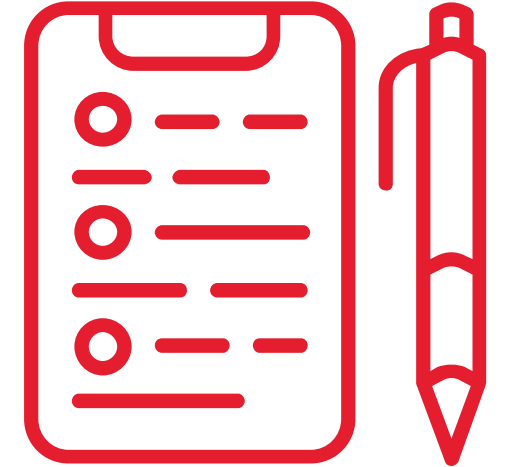
- ✓ Project Brief

- ✓ Internal Kick Off Meeting

- ✓ Requirements Solicitation:
 - Whyx5
 - Role Play
 - Customer Mapping



Project Kick Off



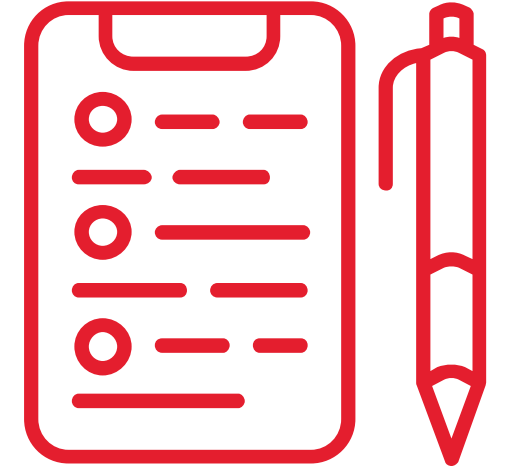
Stakeholder Project Kick Off Agenda

Attendees:	Required: Customer Stakeholder & Project Coordinator
Agenda:	Item
	Review outcomes
	Confirm roles and responsibilities
	Review delivery timeline
	Confirm project governance
	Confirm next steps





Requirements Validation



Requirements Validation Agenda

Attendees:	Required: Project Coordinator, Project Stakeholders Optional: Resources
Agenda:	Item
	Review requirements outlined in attached brief from initial workshops
	Identify changes to requirements or additions to scope
	Confirm next steps for mock-ups

Requirements Solicitation



Questionnaires

Used to determine standard requirements / configuration options

Interviews

Meeting with key people from the association to confirm requirements and establish scope

Functional Requirement Document

Ad-hoc enquiries or seeking clarification should be done immediately

Email

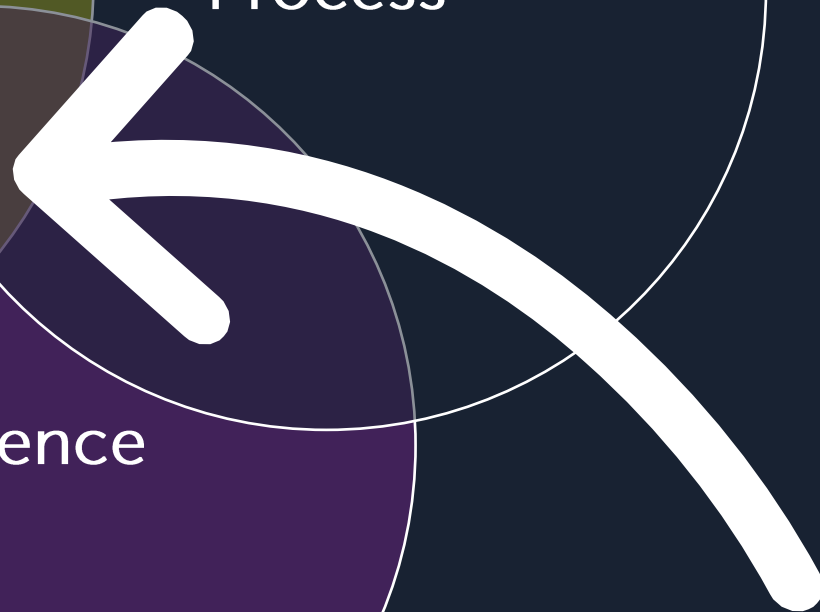
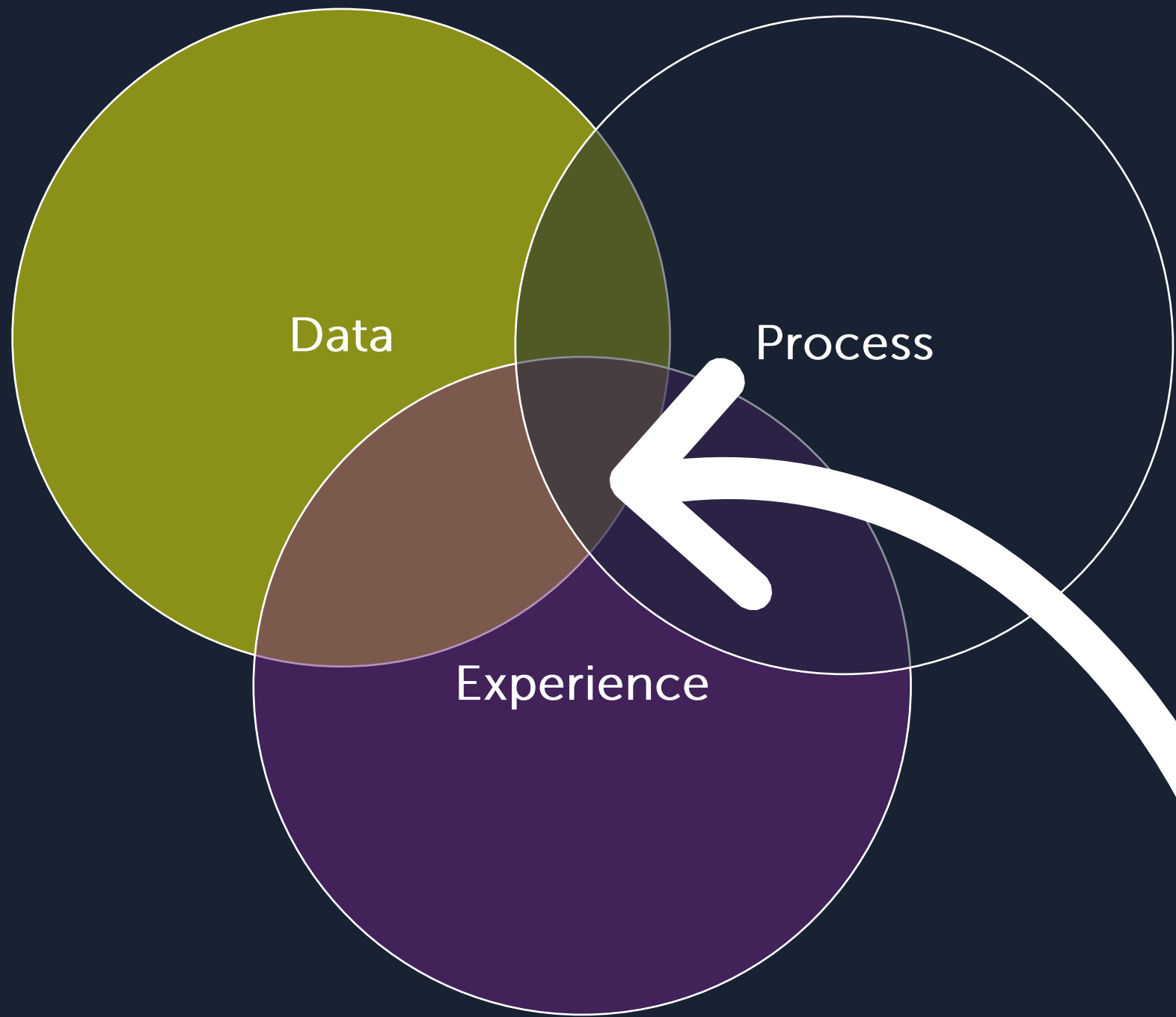
Where points need further clarification email can assist in communicating

Phone Calls

Where the user has specific requirements, this allows them to document and provide functional requirements for the project

Checklists

Ensures all requirements have been considered for “known” project types



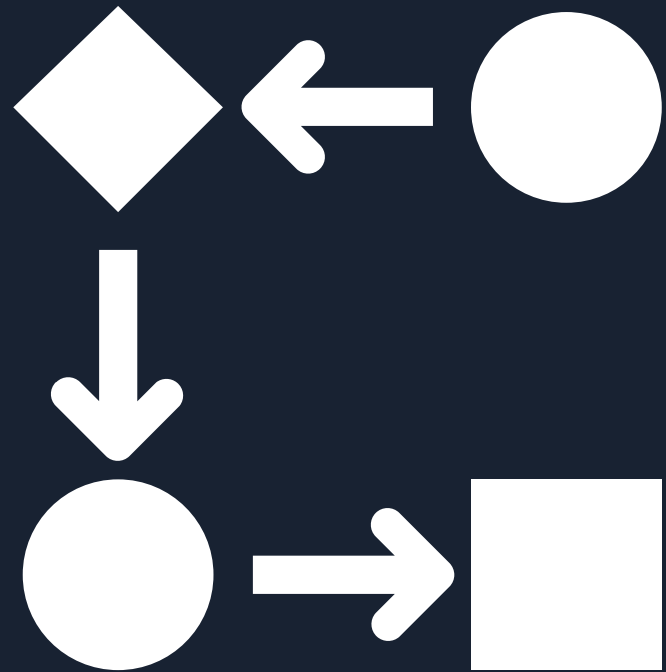
Digital Success

Data. Process. Experience.



- ✓ Ability to talk with metrics and performance KPIs.
- ✓ Measure past success to enable future decision-making.
- ✓ Collect the right data for reporting.
- ✓ Eradicate data-silos.
- ✓ Data managed, secure and maintained.
- ✓ Ability to access real-time metrics (retention, conversion, engagement, performance).

Data. **Process.** Experience.



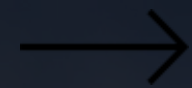
- ✓ Ownership of processes
- ✓ Automation of logical and repetitive process.
- ✓ Map the process end to end test its completeness.
- ✓ Documentation of procedures is cumbersome, try video (use Snagit, or Jing by TechSmith)
- ✓ Core processes to map – New member, event/course registration, renewals, resigning, accessing other benefits

Data. Process. Experience.



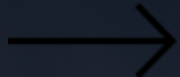
- ✓ Spend a day in the life of your member. Experience your association as the member or non-member.
- ✓ What are the barriers, how did it make you feel, what could be improved?
- ✓ Have you communicated the right message across various platforms?
- ✓ What was the tone and sentiments?
- ✓ Future strategies include a focus on the experience.

Data. Process. Experience.



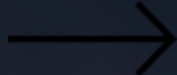
Digital Success	Project Phase	Post 1-Month Live	Post 6-Month Live
DATA			
Is the right data being captured?			
Do you have the right data?			
Can you report on the data?			
Where is the data stored?			
Will the data need maintenance and management?			
Can real-time reports be developed to measure performance?			

Data. **Process.** Experience.



Digital Success	Project Phase	Post 1-Month Live	Post 6-Month Live
PROCESS			
Who owns the process?			
How will change be introduced?			
What is the impact of the process?			
Are there areas that can be automated?			
Has the process considered both internal and external stakeholders?			

Data. Process. Experience.

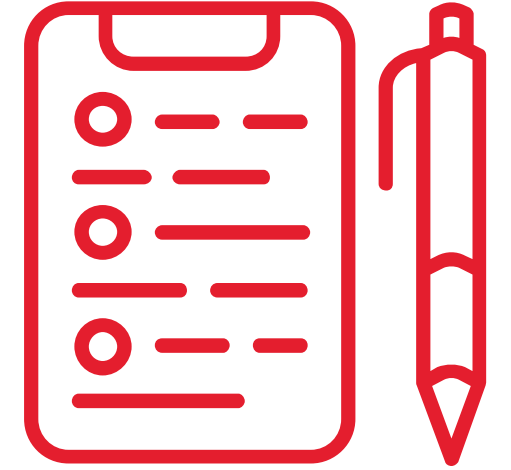


Digital Success	Project Phase	Post 1-Month Live	Post 6-Month Live
EXPERIENCE			
How does the process experience make the customer feel?			
Has the experience been "felt" end-to-end?			
Do the communications both automated and manual reflect the right tone?			
Has the process considered both internal and external stakeholders?			
What happens next after the purchase or use of the product?			

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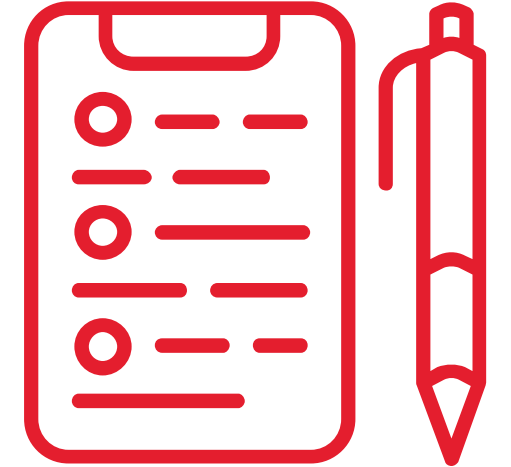
Future Maintenance Issues



- Will the association need to make changes each year?
- Will technology upgrades affect the long-term solution?
- Do we need to think about data storage, security or other legalities?
- How will you train staff, users and other stakeholders?
- Are there change management considerations?
- Who will own and manage it?



Outcomes of Planning

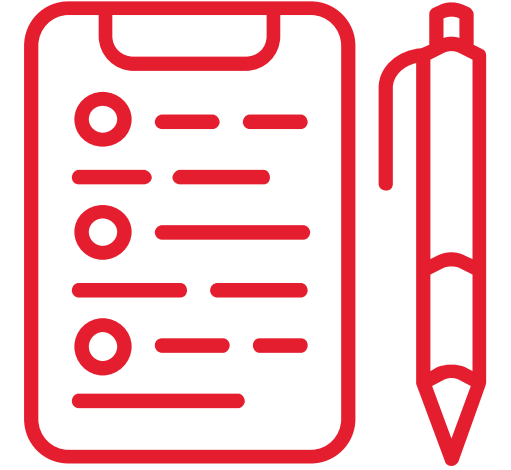


- Project stakeholders have a thorough knowledge of the requirements of the project or ticket task
- Functional Requirements have been determined and therefore a scope confirmed
- Project stakeholders has received a detailed planning document where appropriate for the project
- Creation of Project Milestones and Tasks with timeframes to meet your deadline
- User Acceptance Testing has been defined from the requirements and scenarios
- All of the ducks are in a row





Planning



Me: My ducks are absolutely not in a row.

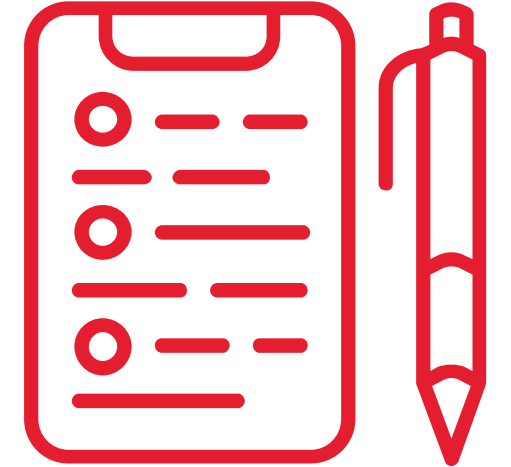
Me: At this point, I don't even know where my ducks are.

My ducks:





Monday.com



Remote Team: Weekly Tasks

Week 1: Nov. 16-20

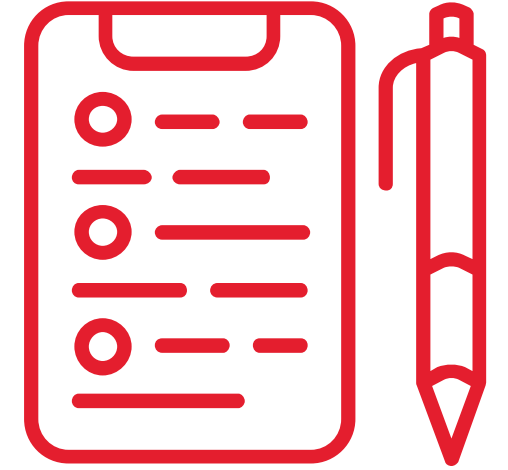
	Owner	Team	Status	Priority	Due Date	+
Weekly team meeting		All	Done	High	Nov 19, 2020	
Subway ads brainstorm		Creative	Done	Medium	Nov 20, 2020	
Update our website projects		R&D	Working on it	High	Nov 18, 2020	

Week 2: Nov. 23-27

	Owner	Category	Status	Priority	Due date	+
Homepage design		Design	Done	High	Nov 24, 2020	
Drafts of lifestyle videos		Motion	Done	Low	Nov 26, 2020	
Content writing for launch		Content	Stuck	High	Nov 27, 2020	
Instagram ads		Marketing	Done	Medium	Nov 26, 2020	



Project Schedule



★ **Template - Project Schedule** ⓘ ☆

🔗 Last seen 👤 Invite / 4 + Add to board

Add board description

🏠 Main Table | +

🔗 Integrate 📦 Automate / 5

New Task ▾ 🔍 Search 👤 Person ⚙️ Filter ▾ ⬆️ Sort 🔗 🔍 📄 📄

▶ Initiation & Planning

Phase Ref ⓘ Subitems Subitems Status Owner Status Timeline Files +

▶ Execution - Phase 1

Phase Ref ⓘ Subitems Subitems Status Owner Status Timeline Files +

Task	Phase Ref	Subitems	Subitems Status	Owner	Status	Timeline	Files
Task 1		▶ 1	Pending	👤	Pending	-	
User Acceptance Testing		1		👤	Pending	-	

▶ Execution - Phase 2

Phase Ref ⓘ Subitems Subitems Status Owner Status Timeline Files +

Task	Phase Ref	Subitems	Subitems Status	Owner	Status	Timeline	Files
Task 1		▶ 1	Pending	👤	Pending	-	
User Acceptance Testing		1		👤	Pending	-	

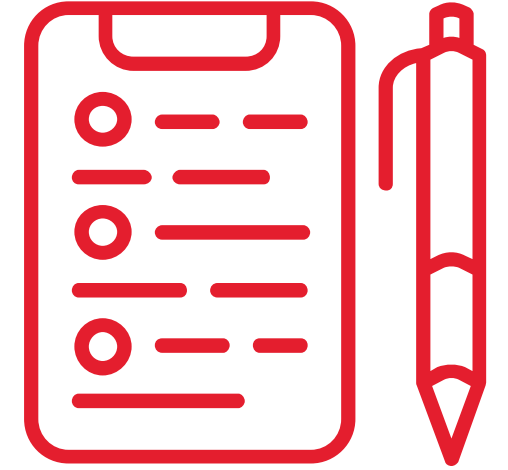
▶ Execution - Phase 3

Phase Ref ⓘ Subitems Subitems Status Owner Status Timeline Files +

Task	Phase Ref	Subitems	Subitems Status	Owner	Status	Timeline	Files
Task 1		▶ 1	Pending	👤	Pending	-	
User Acceptance Testing		1		👤	Pending	-	



Project Schedule



★ **Template - Web Project Schedule** ⓘ ☆

Add board description

🏠 Main Table | +

🔒 Last seen Invite / 1 + Add to board ...

🔗 Integrate ⚙️ Automate / 5 ^

New Task ▾ 🔍 Search @ Person ▾ Filter ▾ ↑↓ Sort 📌 🗑️ ⌵ 📄 📝

Website Project Schedule

	Subitems	Subitems Status	Timeframe	🔒 Owner	Status	🔒 Timeline	Files	⊕
Website design workshop	🗨️		2 Weeks		Pending	-		
Create homepage mockup	▾ 🗨️ 3		3 Weeks		Pending	-		

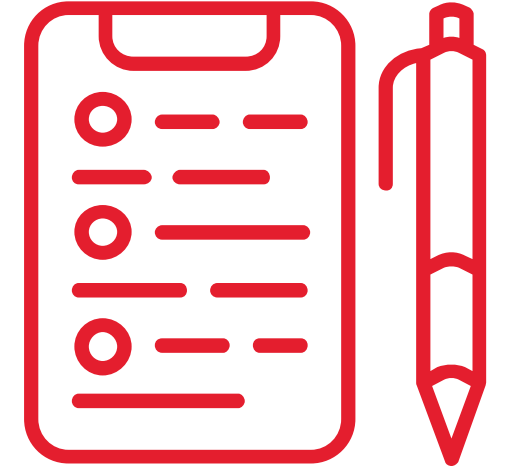
Subitems

	🔒 Owner	Status	🔒 Date	Timeframe	⊕
Mockup feedback provided		Pending		1 Week	
Amendments to mockup made		Pending		3 Days	
Mockup approved		Pending		3 Days	

Create website style guide	🗨️	▸ 🗨️ 3		2 Weeks		Pending	-	
Wireframe and Style Development	🗨️	▸ 🗨️ 7		2 Weeks		Pending	-	
Navigation and Structure Development	🗨️	▸ 🗨️ 4		1 Week		Pending	-	
Content Management	🗨️	🗨️		4 Weeks		Pending	-	
Training & UAT	🗨️	🗨️		2 Weeks		Pending	-	
Go-Live	🗨️	🗨️		1 Week		Pending	-	
Post Go-Live Support	🗨️	🗨️		2 Weeks		Pending	-	



Project Kanban



Project - Project Schedule ⓘ ☆

Add board description

Main Table | **Kanban** | +

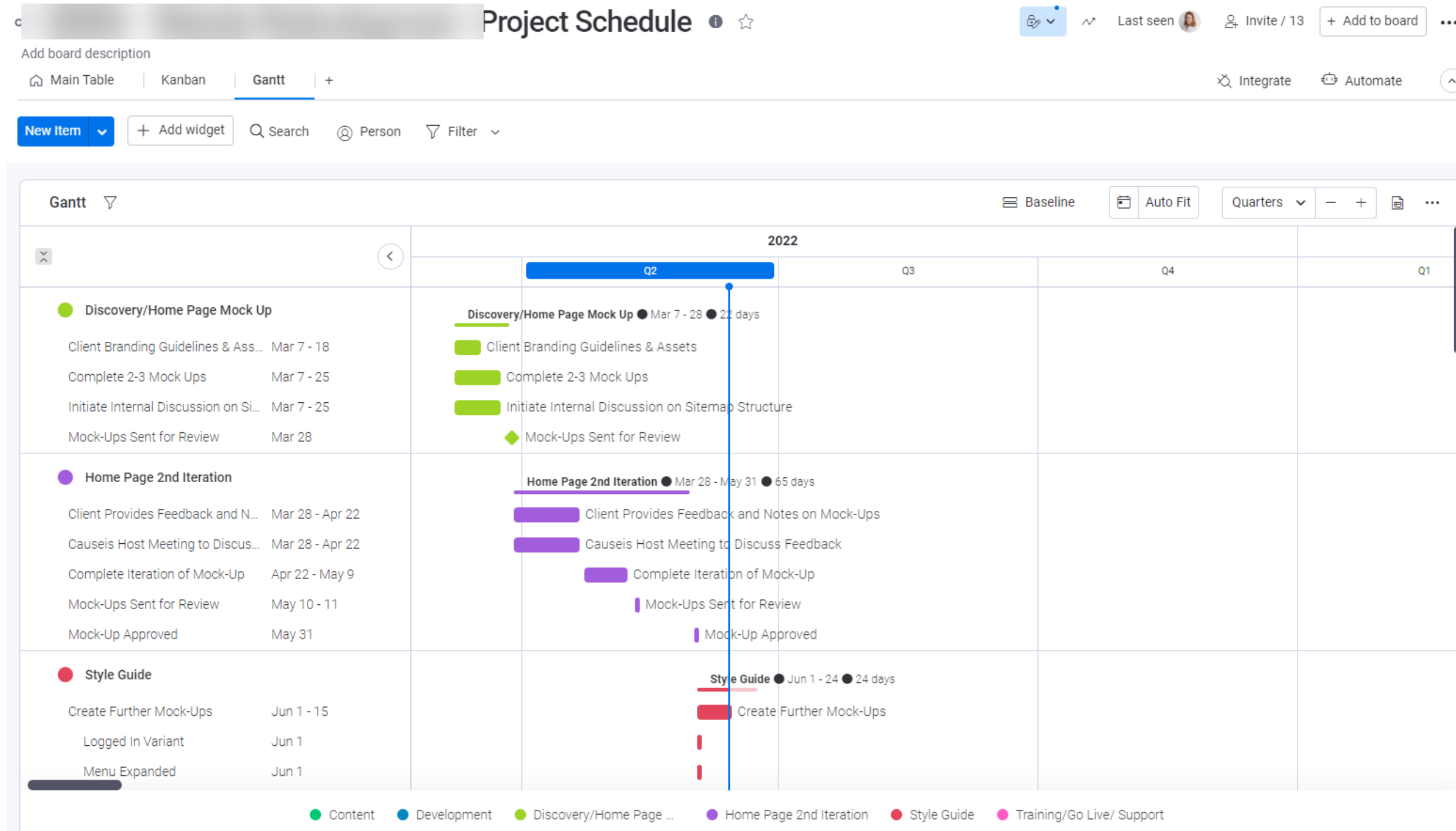
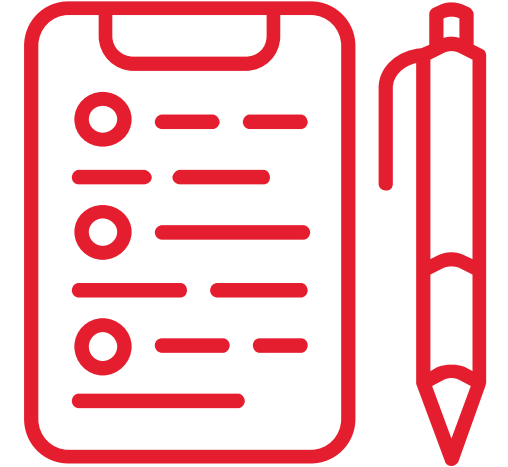
Integrate Automate

New Project Search Person Filter Sort

Pending / 0	In Progress / 0	Completed / 11	On Hold / 0
		<p>Navigation and Structure Framework</p> <p>Person: [Avatar]</p> <p>Status: Completed</p> <p>Group: Digital Develo...</p> <p>Wireframe and Style Development</p> <p>Person: [Avatar]</p> <p>Status: Completed</p> <p>Group: Digital Develo...</p> <p>Validate Requirements and Design Style</p> <p>Person: [Avatar]</p> <p>Status: Completed</p> <p>Group: Discovery Ph...</p> <p>Development of Template Functionality</p> <p>Person: [Avatar]</p>	

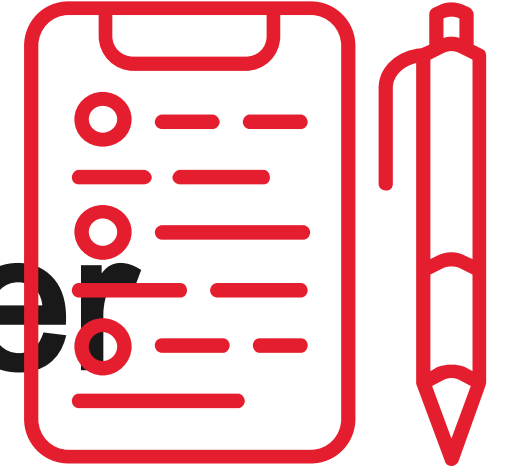


Project Timeline





Project Action Items Register



Templates - Action Items Register

Main Table

New Item Search Person Filter Sort

Open Action Items	Creation Log	Phase Reference	Owner	Status	Due
Item 1	May 21, 2021	-		Pending	

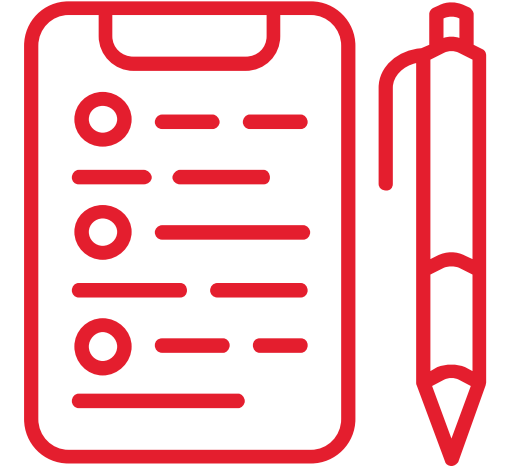
Out of Scope Items	Creation Log	Phase Reference	Owner	Status	Due
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Closed Action Items	Creation Log	Phase Reference	Owner	Status	Due
Item 1	May 21, 2021	-		Pending	

+ Add new group



Go Live Issues Register



★ Client Name - Project Name - Go-Live Issues Register ⓘ ☆

🔒 Last seen Invite / 1 + Add to board ...

Add board description

🏠 Main Table | Form | +

🔗 Integrate 🔄 Automate / 2 ^

New Item ▾ 🔍 Search @ Person ⏚ Filter ▾ ⬆️ Sort ⚙️ 🗑️ ⌵ 📄

📁 Open Items

Raised By /Date Raised

Description of Issue

🔒 Issue Own...

Status

Date Resolved

People



📁 Closed Items

Raised By /Date Raised

Description of Issue

🔒 Issue Own...

Status

Date Resolved

People



+ Add new group

The Causeis framework for successful projects.



INITIATION

- Goals
- High level requirements
- Priority and timeframe
- Impact Assessment

PLANNING

- Current landscape
- Requirements
- Data, Process & Experience
- Maintenance
- Measure of Success

DEVELOPMENT

- Guiding principles
- Considerations (Time, Performance, Impact)
- Development
- Testing

VALIDATION & DEPLOYMENT

- Documentation
- Communications plan
- Metrics
- End user training
- Post live validation

CLOSURE & MEASURE

- CSAT/MX
- Assess against initiation
- Improvement
- Lessons

THREE LENSES: MEMBER, STAFF & THE ASSOCIATION

DATA, PROCESS AND EXPERIENCE

In preparation for Thursday

- Review your project tools and how you track them
- Project Initiation



Project: Phase 1- Initiation

Date:	
Business Owner:	
Business Unit/Team:	
Stakeholders:	
Project Impact :	<input type="checkbox"/> Impact on Business Performance <input type="checkbox"/> Impact on Member Experience <input type="checkbox"/> Impact on Operations Efficiency <input type="checkbox"/> Other
Purpose of requirement:	<input type="checkbox"/> Constitution / Business requirement <input type="checkbox"/> Member Experience <input type="checkbox"/> Efficiency and Process Improvement <input type="checkbox"/> Data Management <input type="checkbox"/> Financial and Auditor <input type="checkbox"/> Other

Project Goal

What is the overarching goal and outcome of the project? How will it support the business?

Project Requirement

*What are the measurable outcomes of the project? How have you solicited the requirements?
What about unknowns?*

Project Priority and Timeframes

What is the priority of the project? How will it be supported by the business? What are the timeframes? Are they realistic?



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Wrapping up Day 1...

Customer
Experience

Prospect and New Member
Experience

Journey Mapping



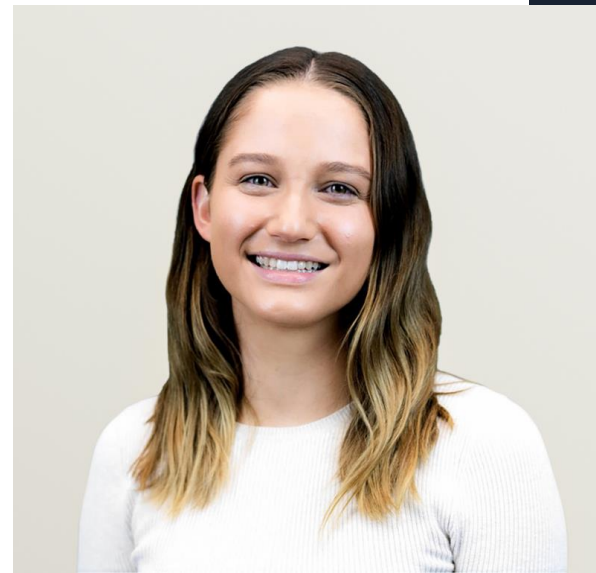
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