



TRACKER TRANSFORMATION

MANAGING CHANGE IN TRACKERS AND NORMED STUDIES

CHAPTER 2 | THE PROJECT PLAN

CHAPTER 2



CHAPTER 2: THE PROJECT PLAN



In chapter 2, we'll discuss concretely what your project should look like by sharing a simple planning template. There are three things to retain from this chapter. One is the importance of transparent, understandable plans with names, dates, and indicators of success. The others are the discipline and communication that ensure you keep the project and participants moving along the path to success.

Project Kickoff: Steering committee and high-level plan of attack

The kickoff is an essential first public step in the process. When handled properly, it will build critical initial belief. It is thus essential to come to the kickoff meeting very well prepared to discuss the following points.

Reasons for change. These should be simple, few in number, and logical given your business context. Be able to explain the underlying issues and causes fluently. Do this by having quiet conversations with colleagues a few weeks in advance of the meeting. The more you familiarize yourself with people's points of view, the more time you will have to synthesize your arguments and the better prepared you will be.

Project phasing and timing. This is about big milestones for the substantive work. This will invariably have five phases: investigation, design, testing, analysis, and implementation. The following section of this chapter talks about this. Use that discussion to estimate a high-level timeline. Six months (including any parallel testing) is a manageable

timeframe provided the project team is disciplined. Too much longer may lead to fatigue, lack of interest, and fatal loss of momentum. Quicker is possible, too, although this implies less time for at least one (if not all) of the essential phases of the project.

Participation. You will need to be inclusive, but being too inclusive will make it difficult to ensure progress. As discussed in chapter 4, if you find yourself with too many people, consider splitting into two groups: a steering committee, that meets frequently, and a larger group of individuals who can be periodically but less frequently informed.

Status updates and communication. There is no such thing as overcommunication in a tracker change project. Set recurring status meetings from the start. These will be important to maintain momentum, and create both the perception and reality of progress and inclusion. These meetings will also become the forum for resolving any critical issues and gaining complete alignment. Notes must be taken and distributed. Note that a status meeting is different from a work session, which should be held separately.

Be very buttoned up at your kickoff meeting, even if your department or company tends to be less formal. When your preparation is done, schedule the meeting with enough time to ensure a full discussion. Build in time boxes to discuss the different components. Allow for discussion, but don't allow people to dominate or derail the group. The worst possible outcome is that your kickoff becomes a forum for opinions of varying quality and constructiveness. Nothing will sink the ship faster than careless talk, with zero structure or substance behind it.

FIVE PHASES TO TRACKER TRANSFORMATION

- 1: Investigation
- 2: Design
- 3: Testing
- 4: Analysis
- 5: Implementation

Phase 1: Investigation

The Investigation phase serves to collect as much information as possible on:

- **Who** is using the data
- **Which** data are being used
- How **frequently** the data are being used
- For what **business purposes** the data are being used, down to the **reports in which these data points appear**, and the **KPIs being tracked**
- What "**problems**" people perceive with the existing tracker, (methodological, economic, or business-related)
- What **improvements** people are looking for, either from the tracker or from some different collection method
- The **post-data collection processes** (operational handling, database extracts and transformations, methodology or weighting) that are applied to turn the tracker data into reports. Study these carefully, as there are almost always skeletons in the closet.

There are **two milestone deliverables** of this phase. First, you will create a comprehensive list of the *possible, but not guaranteed, changes* which will ultimately determine the scope of the project, and which KPIs are likely to be impacted. This list should include the *whys* and *whats*, with names and titles of people interviewed. Second, you will issue a high-level project plan with names and approximate dates to start to create structure and urgency around the project.

Given the above goals, the investigation phase is where you will, and should, have the greatest participation. Depending on the number of people, this phase may take up to two months.

Your **measure of success** for this phase will be the steering committee's agreement that the investigation was open, inclusive, and thorough. Don't assume you have their agreement. Ask people to vocally affirm that they agree the investigation was open, inclusive, and thorough.

Phase 2: Design

The design phase is where people's problems and wishes are transformed into a new research design. The discussion in Chapter 3 around methodology considerations will help frame this phase. While the range of possibilities makes it difficult to contemplate all the questions you should ask, they will generally revolve around the following three points:

ESSENTIAL QUESTIONS DURING THE DESIGN PHASE

1: Are we capturing the market/behavior effectively?

2: Do we need to adapt to become mobile-friendly?

3: Do we want to reduce cost or increase speed?

- **Are we capturing the market or behavior of interest effectively?** If not, is this a problem with the questionnaire or the sample? How permanent are these changes, and can you possibly anticipate where the market may go next to be prepared?
- **Do we need to adapt our study to be device agnostic and mobile friendly?** If so, how might you minimize questionnaire length without disturbing the overall question structure and increasing the probability of breaking trends?
- **Do we want to reduce cost or increase speed?** If so, what concessions are your stakeholders willing to make? Can you do it by reducing sample, decreasing the study's field frequency, or shortening the questionnaire? Do people understand the implications of reducing the resolution of the data?

The design phase is also the first place where the logistics come into play. You will need cost and timing estimates for the new design that include a full parallel test (which we'll discuss further in Chapter 3). Use these estimates to refine your design and your project plan.

You will have **several milestone deliverables** in this phase:

1. The new questionnaire and/or sample design.
2. The list of problems and requests from the investigation phase showing which are addressed in the new design, which are not, and why in either case.
3. The new implications for costs and timing once the new design is implemented, and for the duration of the project.

Depending on the extent of the changes, this phase may also take up to two months.

Your **measure of success** for this phase will be both the steering committee's and the larger body's agreement that the design is acceptable. To this end, you will need to socialize these changes broadly to ensure you have everyone's attention and assent. Again, don't assume you have agreement. Require them to say "Yes, I am fine with this."

Phase 3: Testing

The testing phase is where the new design is put rigorously through its paces. Chapter 3 explains what this entails in greater detail, but for this phase you will need to define, in detail, the following test specifications, then execute the test.

- The Think Aloud Pre-Test
- The experimental design, which will include the specific questionnaire and sample being used as the control vs. test
- The fielding plan for the experiment

IMPORTANT!

Take the time and test carefully. Even the most seemingly insignificant edits can create big changes.

There are **two milestone deliverables** for this phase. First you will produce a **comprehensive test plan** with names and dates that has been reviewed by a research methodologist. Second, following the execution of the test, you will **review and affirm** that the test was conducted according to plan and run a bad test.

The test phase is the only real phase whose duration may vary considerably, as it may depend on the length of your usual field period and how much time you feel is necessary to get a read on the data. Some run in parallel for only a week. Some run for a quarter. Some can run for longer. You will need to balance the duration of the test with the obvious hard and soft costs related to sample and project momentum.

Your **measure of success** for this phase is the execution of the test as planned. It is critical not to compromise at this step. All the careful preparation you have done previously may be for naught if you deviate from the plan.

Phase 4: Analysis

The analysis phase, also discussed in chapter 3, is where you will line up the control data with the test data, and compare each data point side-by-side looking for significant differences. Reproduce the KPIs and metrics that appear in any reporting. Do this for raw and weighted data, if applicable. Have data consumers use the test data in ways they might normally do in the course of their everyday work. This will mean enlisting technical teams to facilitate the production of reports.

Then, schedule sessions (multiple sessions will almost surely be needed) with stakeholders to discuss and develop explanations for any changes in the data. Be maximally inclusive and don't rush this phase. The socialization process is critical for establishing the new truth and, with it, the belief that the new data are as good or better than the old data.

Analyze the new data completely, side-by-side with the old, using your typical reports. This does two things. First, it ensures the new data are coded and processed correctly. Second, it's the only way you can thoroughly evaluate the new data for potential changes.

Your **milestone deliverables** for this phase are a **complete impact analysis report** that shows, side-by-side, the data from the control and the test, as well as **new reports with critical KPIs** and the **agreed-upon list of fixes/changes**.

If the data are significantly different, you will be obliged to decide what to do about the difference. Chapter 3 expands on how to address this. Fundamentally though, you will need to decide to either live with the change or make some sort of adjustment. **If you decide to alter the data, then the details of how the data will be altered must be specified as another milestone deliverable for this phase.**

Your **measure of success** for this phase is the agreement of the broad audience that the changes that have been made are acceptable and can be implemented. As with the other phases, have people affirm vocally (or in writing) that they accept the change. Congratulations! You're almost finished!

Phase 5: Implementation

The implementation phase is where the redesigned tracker goes live and becomes the new "data of record." The activity here, in principle, is nothing more than the continued execution of the process that was designed for the test. That said, it is not always feasible to run tests that precisely mimic a live production environment. Should this be the case, you will need to systematically retest the process from start to finish—including all output—to ensure it is functioning properly.

Your milestone deliverable for this phase will also be your measure of success, namely the on-time and correct fielding of the new tracker. Call an official meeting following the dissemination of the first wave of new data to have people vocally affirm that they accept the results.

Celebrate when you're done!
You've earned it!

Then take a victory lap with the extended group of stakeholders in the form of a celebratory meeting where you thank them for their participation!

Good project management techniques

For each phase of the project, your project manager should use techniques that promote the perception and improve the likelihood that things are under control. There is no magic here. Below are the visible manifestations of best practices.

- **Hold regular meetings, booked in advance.** They should be long and frequent enough for status reports, but not too long or frequent that they feel burdensome.
- **Come prepared.** Always come to the meeting with an agenda of topics to discuss and any decisions to make. If there is little to discuss, have the meeting anyway. People tend to communicate when they are brought together, even if they say they have nothing to talk about. Have them come, review where you are, ask if they have questions, and let them out early if there's nothing else to discuss.

Effective project management means being transparent, prepared and disciplined. Communication is essential at every step of the process.

- **Always ask multiple times if people have questions.** People need to feel heard, and the project manager needs to demonstrate this commitment to listening.
- **Issue meeting notes and the latest iteration of the project plan (with names and dates) promptly.** Send out documentation after each meeting that includes a record of the issues discussed and especially any decisions taken.
- **Create contingency plans.** In cases where there is uncertainty about outcomes, identify probable scenarios and create contingency plans to address them.

- **Communicate regularly.** Weekly communication is essential, whether there has been a meeting or not, if only to inform people where you are in the process and that things are on track. Communicate more frequently during intense periods. Be objective and transparent. Remember, there is no such thing as overcommunication during a tracker change.
- Don't tolerate bad behavior. Keep people on track. If they aren't participating or aren't being constructive, address the issues.



Conclusion

While the devil is always in the details, a tracker change always follows a straightforward project plan. The plan serves more than just the obvious purpose of structuring activity. It provides a roadmap with intersections of participation. It gives people visibility into a difficult process, helps them understand where you've been and where you're going, and in doing so promotes confidence in that process.

A good project manager is equally important. This person becomes the source of authority and progress, the maintainer of momentum and communication, and occasionally the cat herder who arbitrates tough decisions. We'll speak more about this in chapter 4.

CHECKLIST

PHASE	INFORMATION NEEDED	MILESTONE DELIVERABLES	SUCCESS MEASURES
1: INVESTIGATION 1-2 months	<ul style="list-style-type: none"> • Who is using the data • Which data are being used • How frequently the data are being used • For what business purposes the data are being used (find reports & KPIs) • Problems with the existing tracker (methodological, economic, or business-related) • What improvements people are looking for • Post-data collection processes (operational handling, database extracts and transformations, methodology or weighting) 	<ol style="list-style-type: none"> 1. A comprehensive list of the possible, but not guaranteed, changes and KPIs impacted 2. A high-level project plan with names and approximate dates 	Steering committee's agreement that the investigation was open, inclusive, and thorough
2: DESIGN 1-2 months	<ul style="list-style-type: none"> • Understanding of whether market or behavior of interest is being captured effectively, why or why not • Whether study needs to become device agnostic and mobile friendly, and consequences • Whether there's a need to reduce cost or increase speed, and consequences 	<ol style="list-style-type: none"> 1. The new questionnaire and/or sample design 2. The list of problems and requests from the investigation phase showing which are addressed in the new design, which are not, and why in either case 3. The new implications for costs and timing once the new design is implemented, and for the duration of the project 	Steering committee's and the larger body's agreement that the design is acceptable
3: TESTING 1-2 months	<ul style="list-style-type: none"> • The Think Aloud Pre-Test • The experimental design, which will include the specific questionnaire and sample being used as the control vs. test • The fielding plan for the experiment 	<ol style="list-style-type: none"> 1. A comprehensive test plan with names and dates that has been reviewed by a research methodologist 2. Following the test, review and affirm that the test was conducted according to plan 	Affirmation that the test was conducted according to plan
4: ANALYSIS 1-2 months	<p>FULL IMPACT ANALYSIS</p> <ul style="list-style-type: none"> • Line up the control data with the test data and compare each data point side-by-side looking for significant differences • Reproduce the KPIs and metrics that appear in any reporting • Have data consumers use the test data in ways they might normally do in the course of their everyday work 	<ol style="list-style-type: none"> 1. A complete impact analysis report that shows, side-by-side, the data from the control and the test as well as new reports with critical KPIs and the agreed-upon list of fixes/changes 2. Meetings with all stakeholders to review the data 	Agreement of the broad audience that the changes that have been made are acceptable and can be implemented
5: IMPLEMENTATION 1 month	Implementation of the new process/questionnaire/sample in a production environment. (If this is not the same as the test setup, the process and outputs must be re-verified)	On-time and correct fielding of the new study	Confirmation that the new study fielding was done correctly and on time



For more information, please get in touch with us
support@aytm.com | +1 415-364-8601 | aytm.com © 2016