

Taming the 800 pound gorilla: Some insights on managing a multiple-IA project

Problem definition: redesigning a major media company's web site (over 400 site pages) migration to a content management system in a compressed timeline of six months. The site includes extensive self-service and e-commerce flows and new, personalized applications.

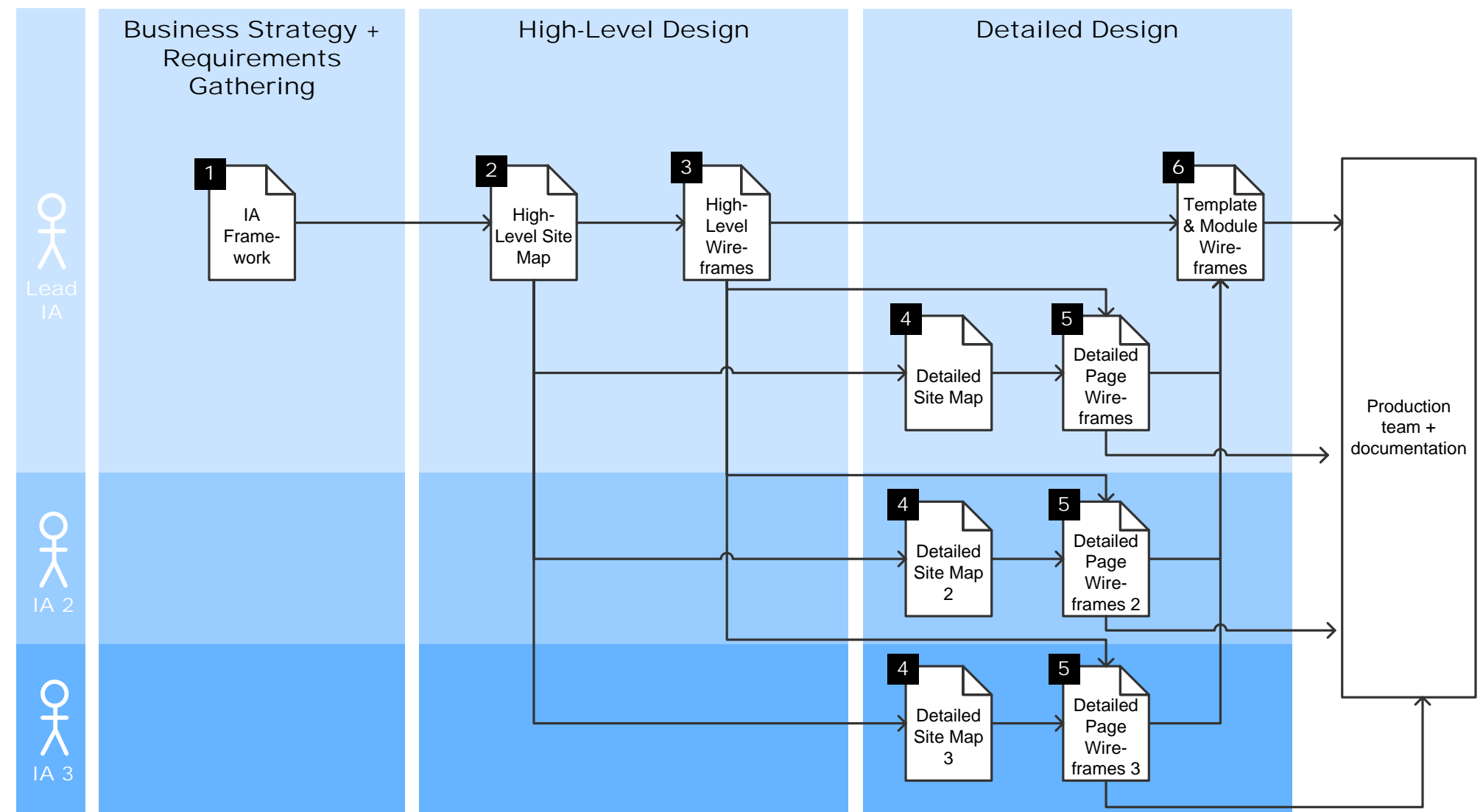
Solution: use a combination of iterative design methods with three semi-autonomous IAs, with one IA acting as Lead.

Our effort required over 2000 person-hours of IA time divided between three IAs and over 400 pages of wireframe documentation. Not only was this a Herculean effort to document, it required the IA team to improvise strategies for managing our work as part of a large, iterative design process undertaken with the client's in-house e-Business and IT teams.

Document Strategy

- Created higher-level documentation at the beginning that established elements like global navigation (1, 2).
- Some initial detailed design of major site areas was started in order to ensure some depth of thinking at this point (3).
- We then divided the site into chapters and each IA was assigned a group of chapters for which they were responsible (4, 5).
- As the project progressed, elements of the higher level documents were either incorporated in the chapter wireframe documents, or became the basis for global "module" or "template" definition documents that contained elements to be reused across the site (6).

- 1** Detailed Site Map: Full site map; in our particular case this was done on a section-by-section basis and then consolidated with the H-L Site Map.
- 2** Detailed Wireframes: Full wireframes, done on a section-by-section basis.
- 3** Templates & Modules: While some of the work done on the H-L Wireframes found its way into the detailed Wireframe documents, other parts of the H-L Wireframes formed the basis for our Templates and Modules documents. Essentially, these became repositories for reusable designs across the site, such as for index pages and page elements.
- 4** IA Framework: a conceptual document that outlined the basic architectural / interaction strategy of the site.
- 5** H-L Site Map: a first pass of the site map outlining major sections (1st level) and sub-sections (2nd level).
- 6** H-L Wireframes: representative group of wireframes, including home page, major site sections and index pages, and an example of major applications if appropriate. Later on in the process, this became a "seed" document for Detailed Wireframes and Templates & Modules. Once these detailed documents were established, the H-L Wireframe document was considered obsolete.



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Division of Work

In our model, the Lead IA was responsible for the higher-level strategic and tactical decisions on the site, and then split the lower-level work into distinct groups or chapters. Chapters were divided among the IAs based on workload and subject matter that played to their individual areas of expertise.

Lead IA:

- Develop high-level interaction architecture
- Orient, guide and review work by IAs
- Liase w/ Project Manager, Lead Content Strategist, Creative Director and Art Director
- Attend weekly internal and external (client-facing) status meetings
- Attend first client reviews of all deliverables
- Create detailed-level wireframes as needed
- Attribute 25-50% of time to administrative and lead tasks

IAs:

- Develop detailed-level deliverables and wireframes
- Follow higher-level guidelines set out in the high-level documents (site map, pages, templates) when designing distinct sections of the site
- Liase w/ Project Manager and client on issues relating to detailed-level deliverables
- Present deliverables to client
- Periodically review deliverables with Lead IA and other IAs as needed

Project Management + Role Definition

One of the most important aspects of our multi-IA method was the definition of the roles and responsibilities of the team project manager and the Lead IA. While the exact division of responsibility could be flexible depending on project attributes and constraints, it is important to delineate clear roles between the PM and Lead IA to ensure clear lines of communication in the team and an efficient division of work.

Project Manager:

- Create, resource and delegate tasks to individual IAs
- Manage all IA resources and tasks
- Manage communication with project team and client on issues relating to the scope and timeline of detailed-level deliverables
- Manage timelines and budget with client
- Periodically review deliverables with Lead IA and other IAs as needed

Lead IA:

- Provide recommendations to PM on how to divide resources and tasks
- Review all documentation for consistency and accuracy
- Attend all client reviews
- Consult with PM on escalation of client issues relating to detailed-level deliverables

Client Relations Management

The model for client interaction followed that of the division of work, allowing the IAs a level of autonomy over their areas such that they could work directly with the client. The involvement of the Lead IA in initial deliverable reviews and required meetings ensured overall consistency, and served to address many of the questions that surfaced regarding the high-level strategy for the project.

Lead IA:

- Manage overall client relationship
- Broker and manage senior-level client relationships at (SVP, Director of E-business, Director of IT)
- Serve as point of escalation for clients and IAs to help resolve issues
- Cross-attend meetings requiring special focus or attention
- Serve as main point of contact for weekly status meetings

IAs:

- Manage client relationship for respective area
- Manage client relationships at the practitioner level (DBAs, Developers, Producers, Technical Writers)
- Own and lead all presentations with client on subject area documents
- Serve as direct point of contact for client questions
- Cross-attend other IAs and Lead IA meetings, as needed
- Attend weekly client status meetings

Knowledge Management + Change Tracking

The Lead IAs and IAs shared equal responsibility for knowledge management and change tracking for each of his/her documents.

Regular internal reviews were held to allow project team members to clarify their understanding of deliverables and raise issues, and further reinforced the project's strategy and consistency. Documentation was managed through a project extranet, accessible by both internal and client teams to review documents, finalized deliverables, team contact information, etc. When tracking changes to documents, even a minor edit constituted a version change. Updated documents were distributed by email, with "track changes" notes included in the body of the email.

Lead IA & IAs:

- Brief the internal project team on all deliverables
- Track changes in detail on document cover page(s)
- Save updated versions of documents to project folders on the network and the project extranet
- Communicate updates to the client and project team by email