Welcome to Remote Project Management 101!

While we gather, please

- Find your mute button – you should be on mute unless speaking
- Find the chat option
- Find the raise-your-hand option
- If you do not have a good video set up, please set your avatar via preferences to show a picture of you

Remote Project Management 101

Thoughts on coordinating the people, places, and things you never actually get to see in person.

Brought to you by:

Heather Flanagan, Spherical Cow Consulting

Managing a Remote Project

- These suggestions are for Agile-style projects
  - Waterfall-style projects likely have a different set of requirements for collaboration

- General Formula
  - Coordinating a project remotely requires:
    - a way to hold multi-person remote meetings
    - a way to collaboratively track tasks
    - a way to share content
    - a way to support IM

When (and When Not) to Use These Tips

- Regular check-ins do not require video calls
  - Try Slack or another IM service – you'll get the interaction without the overhead, and you'll have a written record you and the participant(s) can refer back to

- If your team finds a different way that works best for them, adapt to it
  - It's not the tools that are important, it's the team and the work. Be flexible!
  - Don't be so flexible that each team member does something different.

- Your company/organization may already have tools in place; don't start using something new if there is already something available

The Introduction for All Conference Calls

- Everyone (but especially V/C organizers): schedule a meeting purely to play around and get familiar with the tools you'll be using

- Everyone: make sure you know where the mute button is. Your default should be to be on mute.
  - Do not lose the mute button!
    - Bonus prize: a headset with its own mute system that is easier to track than a button four windows deep on your monitor

- Everyone: video is helpful, but only if you have a decent set up for it (good lighting, good camera positioning, no distractions)
  - Test your camera in advance!
    - Bonus prize: if you don't have a decent set up, consider using a headshot as your icon/avatar in your v/c tool of chose

A Special Note for V/C Organizers

- Having an intro slide that reminds people of the etiquette of conference calls is a Good Thing (see the start of this deck)
  - Don't make a big deal out of it
  - Make this the Intro that everyone will see while you wait for people to finish joining

- Having a way to make sure people are heard is Very Important
  - Some v/c tools (e.g., Zoom) have a way for people to raise their hands
  - Most v/c tools (e.g., every single one I've ever used) have a way to chat

- Say "hello" to people as they join
  - It is both polite and acts as a sound check
  - Does not scale to 20+ participants

- Expect the call to start 5 minutes after the scheduled start time. Accept it. Embrace it. Say "hello" to a few more people.

About Accessibility

- Of course you'll optimize for the most typical use case … BUT!
  - Some people will have to use their phones
  - Some people will have minimal bandwidth
  - Some people can't see

- If you know anyone on your team will be handling any of the above
  - Kill the video
  - Keep any slides you use as basic as possible (e.g., black and white text instead of fancy templates)
  - Send slides in advance so people can see them on a different device

Tools for Multi-person Remote Meetings

- Google Hangouts
  - https://www.techradar.com/how-to/how-to-use-google-hangouts
  - Pros – free!
  - Cons – corporate networks may not allow Google anything; privacy policy may be a concern
- Zoom
  - https://support.zoom.us/hc/en-us/articles/201362033-Getting-Started-on-Windows-and-Mac
  - Pros – common platform; significant range of functionality; free for meetings up to 40 minutes
  - Cons – not free for calls more than 40 minutes; security experts are deeply suspicious of the platform due to previous security issues
- BlueJeans
  - https://www.owllabs.com/blog/bluejeans
  - Pros – common platform; supports a whiteboardCons – not free; limited functionality compared to Zoom

Tools for Collaboratively Tracking Tasks

- **GitHub** Issues
  - https://help.github.com/en/github/managing-your-work-on-github/about-issues
  - Pros – free (for open projects); you win massive geek points with your IT team!
  - Cons – non-trivial to set up to fit your workflow

- **Trello** Boards
  - https://zapier.com/blog/how-to-use-trello/
  - Pros – free (until you want certain add-on features and multiple private boards); very easy to use
  - Cons – only as organized as you are

- **OpenProject**
  - https://opensource.com/article/17/11/how-install-and-use-openproject
  - Pros – supports a more traditional look/feel to project management; an open source version is available; a managed cloud-based version is also available (for a fee)
  - Cons – some configuration is still required; free version is not trivial to install and configure

Tools for Sharing Content

- [Google Docs](#)
  - https://www.howtogeek.com/420971/the-beginners-guide-to-google-docs/
  - Pros – available to anyone with a Google account; no special client required
  - Cons – not available to all corporate networks; privacy policy is more in Google's favor than yours; does NOT have all the features of a Microsoft product
- [Office 365](#)
  - https://support.office.com/en-gb/article/collaborate-from-anywhere-using-office-365-ac05a41e-0b49-4420-9ebc-190ee4e744f4?ui=en-US&rs=en-GB&ad=GB
  - Pros – much more MS Word-like in its features (as one would hope!)
  - Cons – requires a subscription
- [Dropbox](#)
  - https://www.cloudwards.net/how-to-use-dropbox/
  - Pros – can also be used for [project management](#); handles versioning
  - Cons – does not support collaborative editing; requires an account
- Email
  - Pros – everyone has it; can push information out to people
  - Cons – horrible for managing versions of documents; corporate networks may do unnatural things to attachments

Tracking versus Sharing

- Different tools have different strengths … and weaknesses
- Have a plan before you start for how you're going to use the tools you have available
- DO – link tasks back to the point of collaboration (e.g., point a Trello card to your Google Doc)
- DON'T – start using your collaboration tool to track tasks, or your task tool to start collaborating on content!

Tools for Instant Messaging

- Slack
  - https://kinsta.com/blog/how-to-use-slack/
  - The Tool To Use these days; you can also use it to make calls!
- Skype
  - Free for IM and Skype-to-Skype calls
  - Can be used to call phones around the world (for a small fee)

- SMS
  - Unless you know the recipient receives messages on their primary device, using text messages for work communication is **not** a good idea

Bonus Points

- Using virtual white boards – depending on what your team does, these might be helpful
  - https://zapier.com/blog/best-online-whiteboard/

- Keeping your own, personal to-do list – track your personal reminders to follow up on the small things (returning a call, sending out a reminder to fill out a calendaring poll)
  - https://zapier.com/blog/best-todo-list-apps/
  - Post-It notes work, too!

- Calendaring (if your project spans multiple organizations)
  - https://doodle.com