Roadmap

(Roadmap + Basecamp)

# Best Practices Guide

November 2011
Version 1.1

**Mac users, please read me first!**

Clicking hyperlinks will not work if you're using Preview. Be sure to right-click the PDF and open with Adobe Reader.

# Table of Contents

# 1 Introduction

Before jumping right into how to best use Roadmap (or use Roadmap and Basecamp together) let's review the primary Roadmap use cases, as well as some of the main pages in the application.

## 1.1 Project-Centric

View everything from the perspective of – or through the prism of – the project. Ideal for weekly status meetings covering multiple projects:

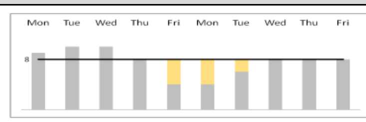
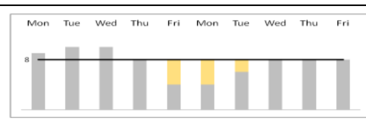
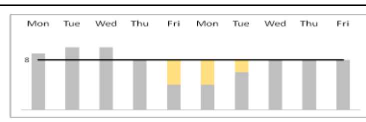
| | Project Health | Days Until Due | Roadblocks | Milestones | Project Lead |
|---|---|---|---|---|---|
| Project 1 | Critical | -1 | ☐ Roadblock | ☐ Milestone | Bill |
| Project 2 | At Risk | 32 | ☐ Roadblock | ☐ Milestone | Anne |
| Project 3 | On-Time | 75 | | ☐ Milestone | Dave |

. . . or periodic planning reviews focused on alignment with broader (strategic) objectives:

| | Objective | Project Type | ROI | Fiscal Year | Region |
|---|---|---|---|---|---|
| Project 1 | Parity | Mobile App | 9.9% | 2011 | Global |
| Project 2 | Cost Savings | Web App | 7.2% | 2011 | Asia Pacific |
| Project 3 | Regulatory | Reporting | 5.3% | 2012 | N. America |

## 1.2 Resource-Centric

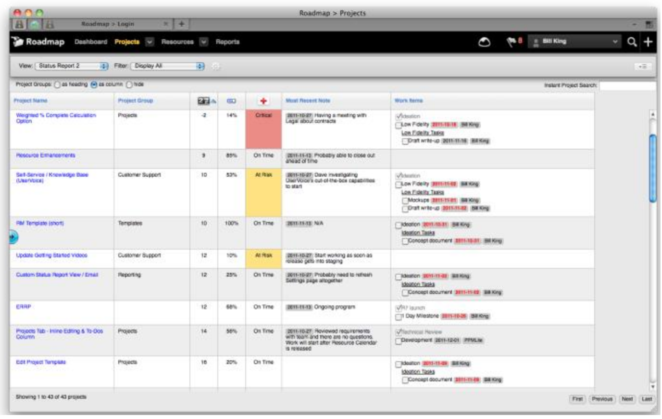
View everything from the perspective of – or through the prism of – the resource. Ideal for planning/staffing managers at the cross-portfolio level, and manager-employee 1:1s, or viewing resources at the individual level.

| | Role | Availability | To-Dos | Roadblocks |
|---|---|---|---|---|
| Resource 1 | Developer |  | ☐ To-do<br>☐ To-do<br>☐ To-do | ☐ Roadblock |
| Resource 3 | Designer |  | ☐ To-do<br>☐ To-do | ☐ Roadblock |
| Resource 3 | Analyst |  | ☐ To-do<br>☐ To-do | |

## 1.3 Key Application Pages

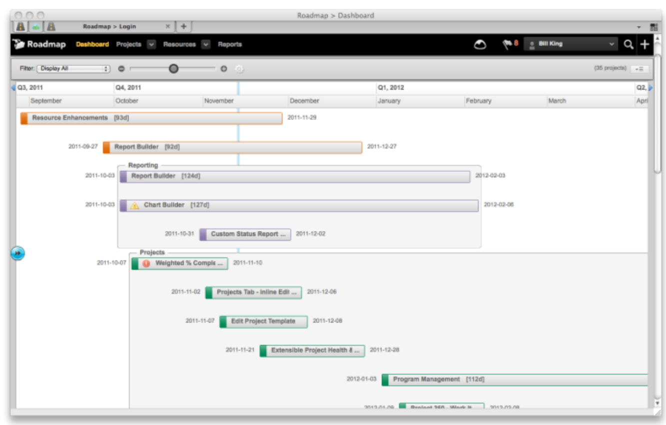
### Projects Tab

- Top-down grid view of projects
- Custom criteria and column order
- Sortable and filterable
- Instant type-down page search
- Export to Excel



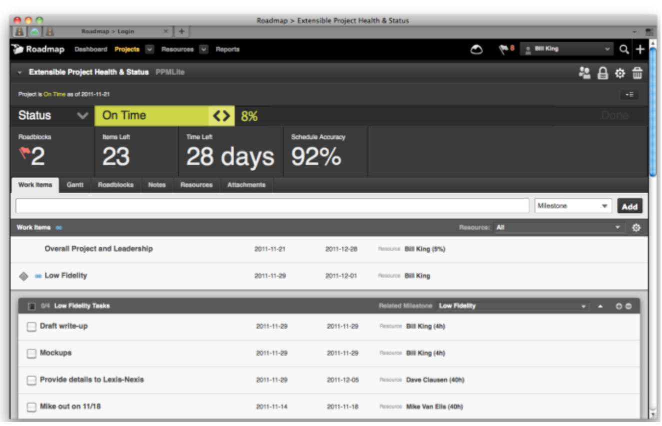
### Dashboard Tab

- Top-down Gantt view of projects
- Interactive, drag-and-drop projects and milestones
- Filterable
- Export to image file (.png)



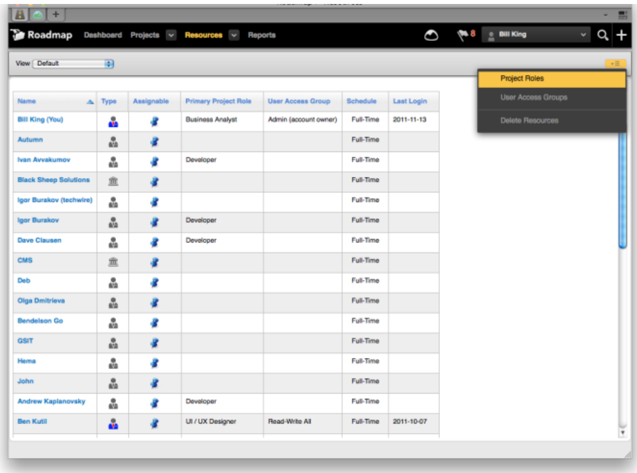
### Project 360

- Bottoms-up detail view of individual project
- Project health, status and stats
- Sub-tabs for work items, Gantt, resources, roadblocks, notes and attachments
- Schedule audit (Pro only)



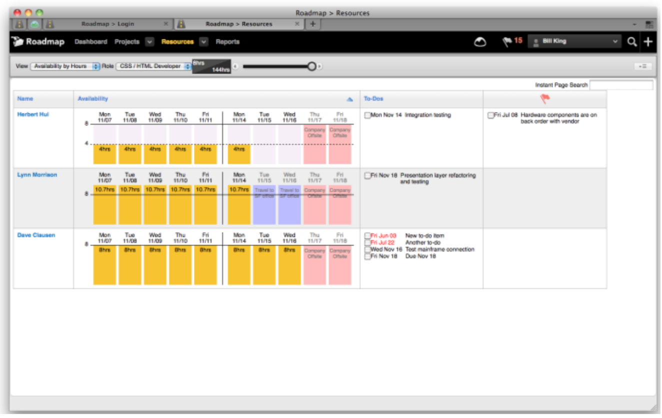
### Resources Tab

- Top-down grid view of resources
- Sort by name, role, type, assignable, user access group, schedule and last login
- Add or edit project roles
- Add or edit user access groups
- Bulk delete or archive resources



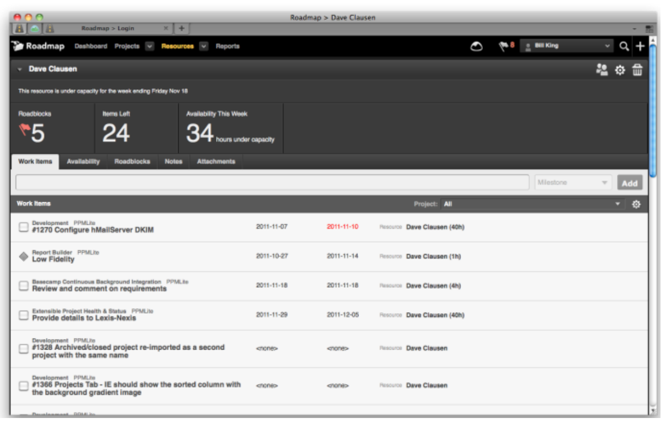

### Resources Tab – Availability View

- Top-down grid view of resources
- Sort by name or availability
- Filter by role
- View assigned to-dos and roadblocks to provide greater context




### Resource 360

- Bottoms-up detail view of individual resource
- Resource workload and statistics
- Sub-tabs for work items, availability, roadblocks, notes and attachments
- Filter work items by project



### 1.4 Project Portfolio Management

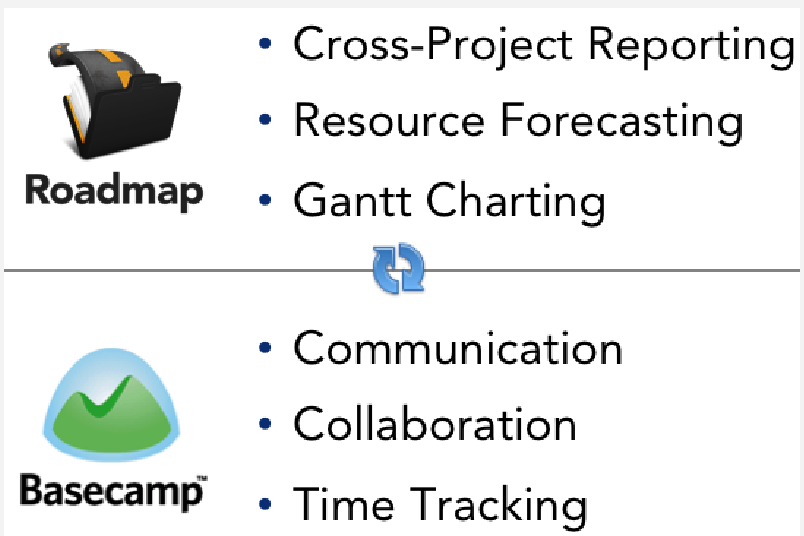
Project Portfolio Management (PPM) describes the method for "analyzing and collectively managing a group of current or proposed projects based on numerous key characteristics" with the objective of defining the best "mix and sequencing" of projects.[1] Further, PPM provides structure to "standardize and introduce economies of repetition in the execution of projects."[2]

The Roadcrew started **Roadmap** because we loved using **Basecamp** to manage individual projects, but we needed something better than a spreadsheet to:

- Communicate status and health on multiple projects every week
- Balance and forecast resources on a continuous basis
- Run cross-project reports on criteria such as objective, type, timing . . . data requested by senior management for monthly or quarterly portfolio reviews

**Additional References**

– How do Roadmap + Basecamp fit together?




[1] Wikipedia [Project portfolio management]

[2] Wikipedia [Project management office]

# 2 Account Set-Up

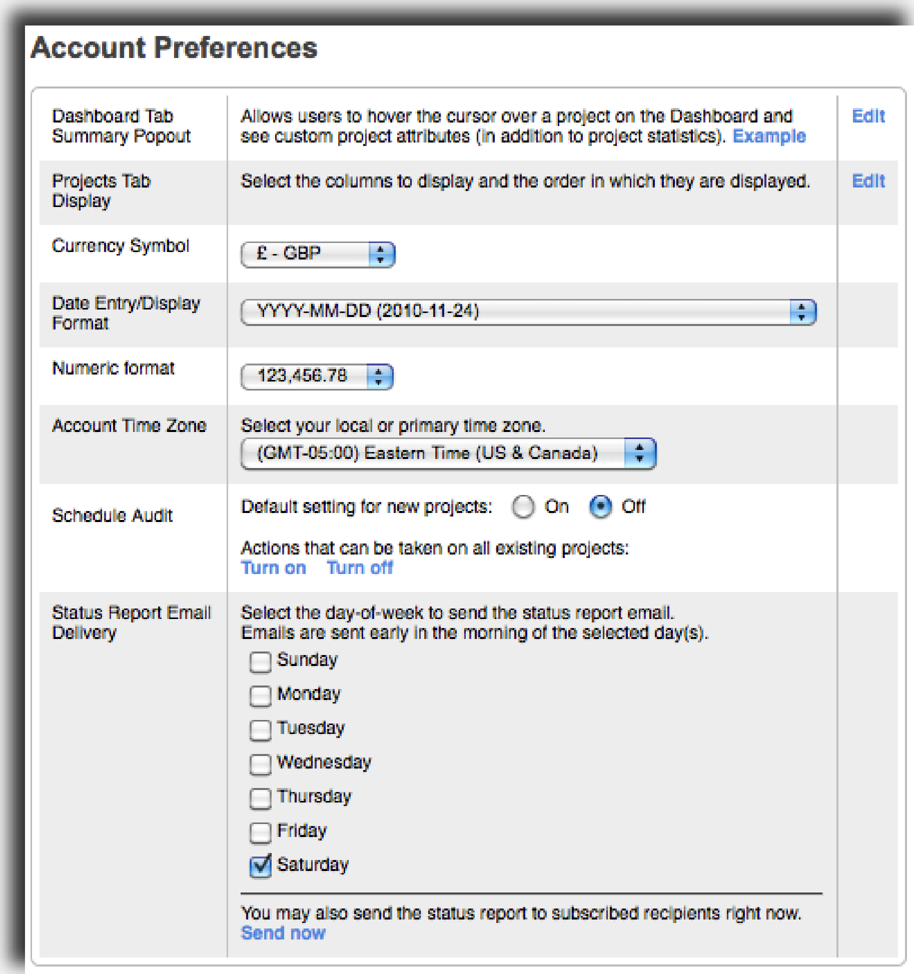
## 2.1 Account-Wide Preferences

The first thing to do is get your account preferences sorted out, especially these ones:

- Edit the default projects tab view in Projects Tab Display (soon you will be able to edit this from the Projects Tab)
- Select currency symbol, preferred date entry / date display format and numeric format
- Account time zone

### Additional References

– How do I start? In the upper right, click your name **Resources Tab -> Settings**



## 2.2 Define & Create Key Metrics

Think about the many ways you already "slice and dice" your data today – how you report on your project portfolio – and the various scenarios in which certain combinations of that data are useful:

- Weekly project reviews. How do you measure and talk about weekly projects with your team, colleagues, and senior management?
- Portfolio reviews. How do you tie together the projects you're working on and the projects in the pipeline with broader, strategic objectives established in your business unit or organization?

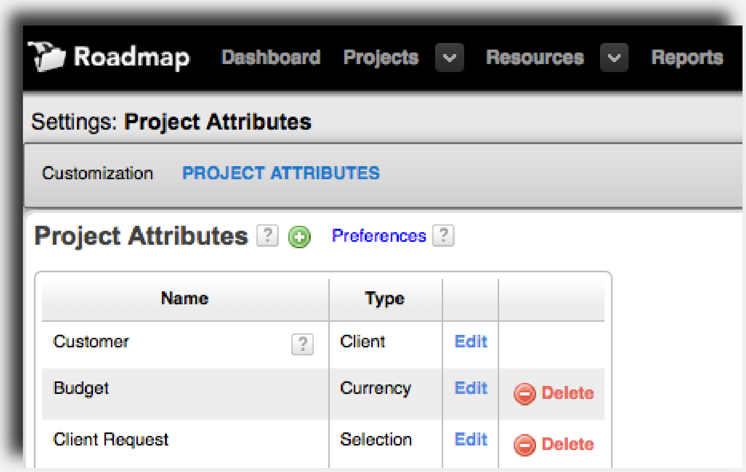
Roadmap supports several types of project attribute types that allow you to filter and sort across several projects:

- Selection. Create a list of drop-menu items. Limit projects to a single selection or allow multiple selections (e.g. project type is "Web App" and "Mobile App").
- Text. Provide long or shot text fields with default text entry.
- Number. Set a default value and minimum / maximum range.
- Percentage. Set a default value and minimum / maximum range.
- Currency. Set a default value and minimum / maximum range. Displays account-wide currency symbol.
- Date. Date picker.
- Checkbox. Set a default value of unchecked or checked.

### Additional References

– How do I start? Go to **Settings -> Project Attributes**

– Video tutorial: How to Create & Manage Project Attributes (2:19)



## 2.3 Create Custom Views

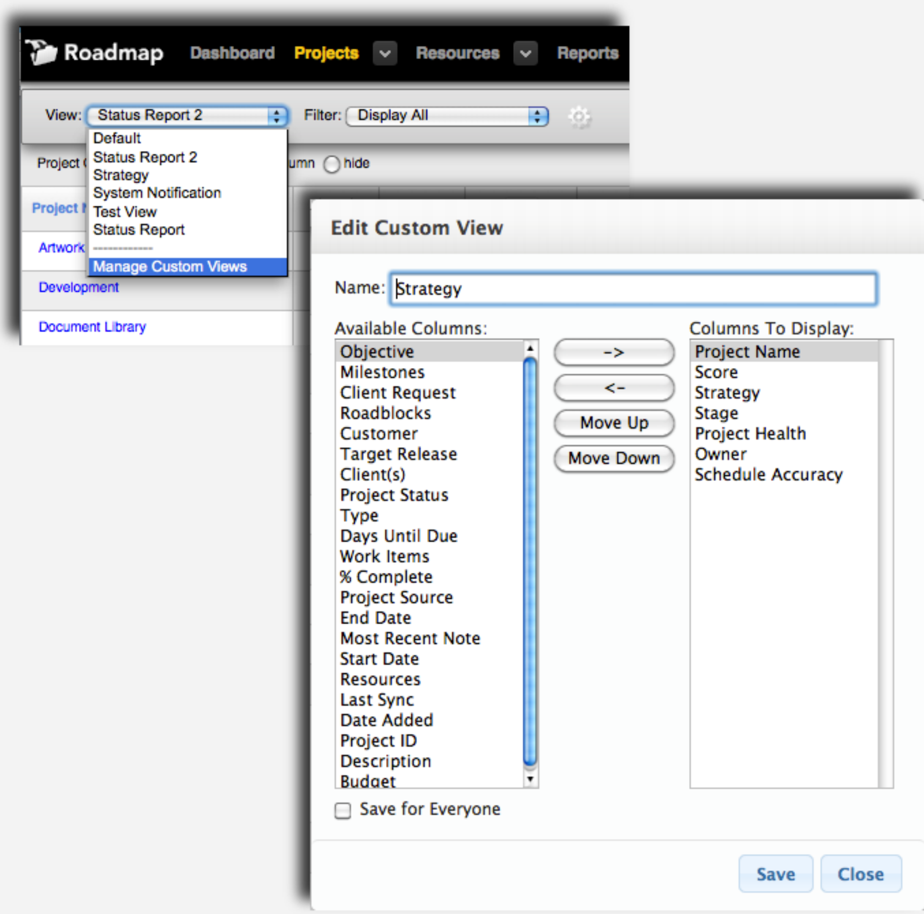
Now that you've created some project attributes create different views for the Projects Tab. Map each view to a different scenario (e.g. monthly portfolio view). Admins can create and publish or syndicate views to all users.

There are two out-of-the-box views:

- Default view that is editable by admins (from Settings page) and automatically syndicated to all users. Must be edited from Settings but soon will be editable from the Projects Tab.
- Status Report view which contains the same columns as the Status Report Email. The Status Report view is not editable today but it will be soon.

### Additional References

– How do I start? Go to **Projects Tab -> View** drop menu



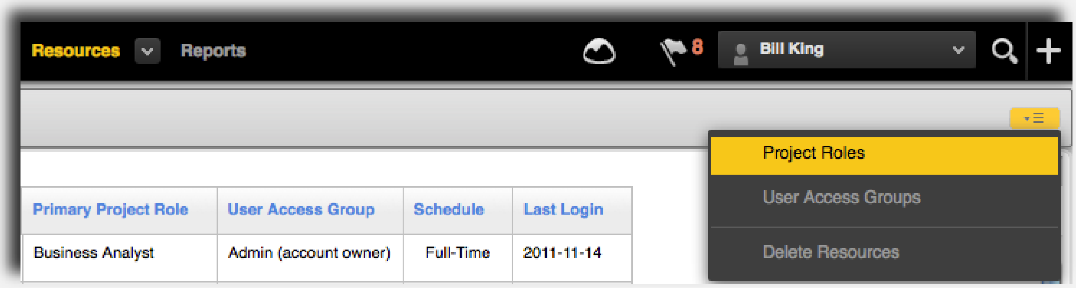
## 2.4 Create Project Roles

Add or edit the out-of-the-box project roles. Project roles are used in several ways:

- Find By Availability filters the search for resources by project role when creating a new to-do or milestone
- Resources Tab – Availability View filters by project role when looking at availability in general vs. a specific work assignment
- As a convenience, a resource's primary project role is automatically added when assigned to a new to-do or milestone, though this can be over-written as needed

### Additional References

– How do I start? Go to **Resources Tab** and select Project Roles menu option

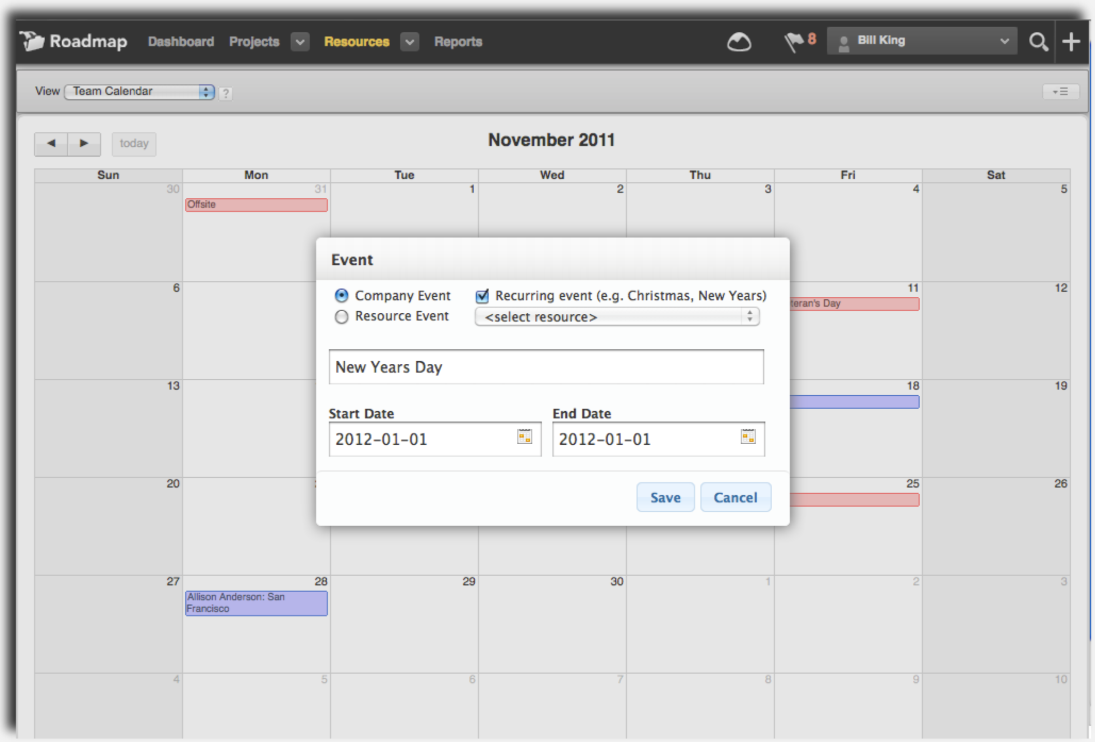


## 2.5 Team Calendar – Company-Wide Events / Holidays

Before adding lots of people, enter all known company and national holidays. Be sure to select the recurring checkbox when relevant.

### Additional References

– How do I start? Go to **Resources Tab -> Team Calendar View**



## 2.6 Add (Some) People

Roadmap has three types of people: users, resources, and interested parties.

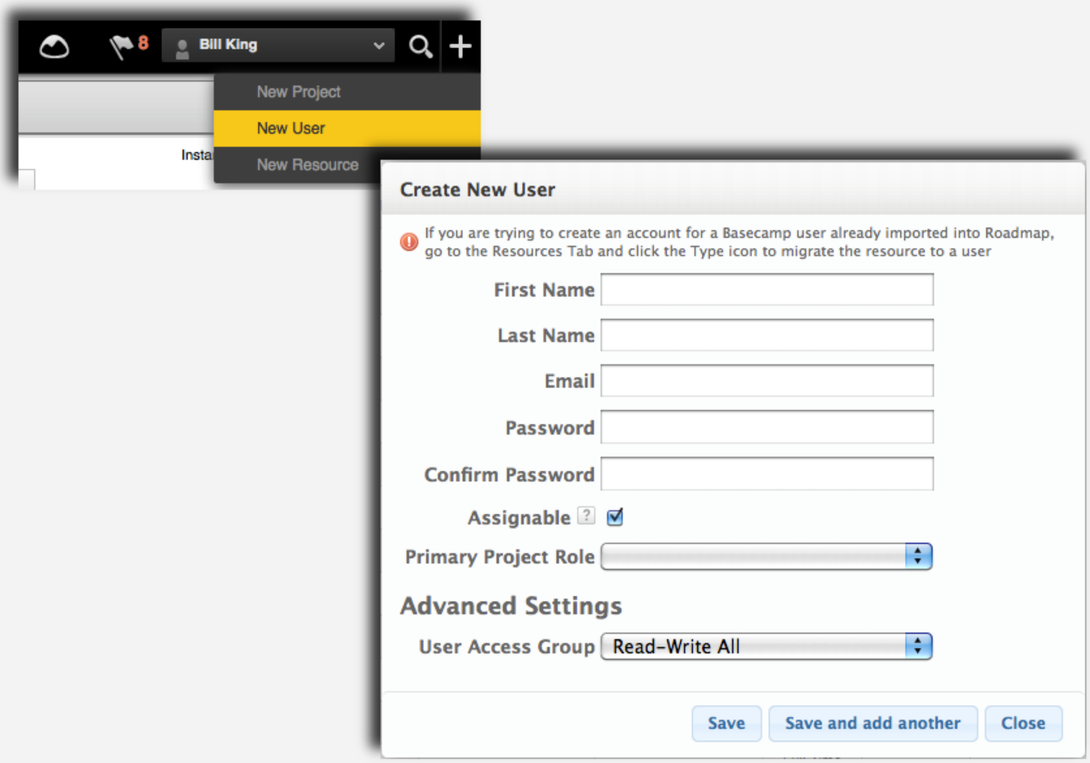
<table>
<tr><th></th><th>Log into Roadmap?</th><th>Assign to Work Items?</th></tr>
<tr><td>User</td><td>Yes</td><td>Yes</td></tr>
<tr><td>Resource</td><td rowspan="2">No, but can easily be migrated to user</td><td rowspan="2">Yes</td></tr>
<tr><td>Imported Basecamp Person[1]</td></tr>
<tr><td>Interested Party[2]</td><td>No</td><td>No</td></tr>
</table>

[1] *All first-time imported Basecamp people are configured as resources*
[2] *Interested parties can only be added to (i.e. subscribed) to automated status report emails*

We recommend new accounts get acclimated with using Roadmap before adding large number of users, or migrating imported Basecamp people to Roadmap users en masse. See section 3.3 for more information about Work Items.

### Additional References

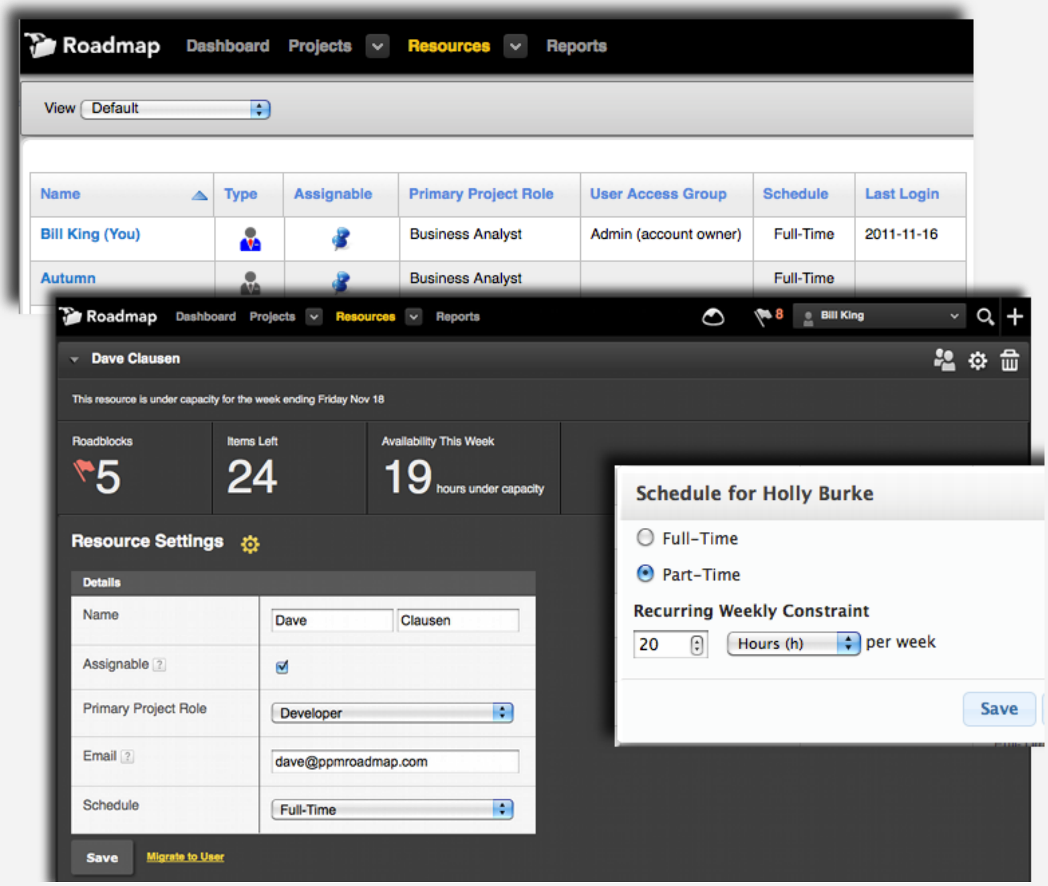
– How do I start? Click on the **"+"** in the upper right corner of any page



## 2.7 Edit People

Efficiently edit many people from the Resources Tab, or selected people from the Resource 360 page. From either place, you can mark a resource as unassignable, select their primary project role, add them to a user access group, or change them to a part-time resource.

### Additional References

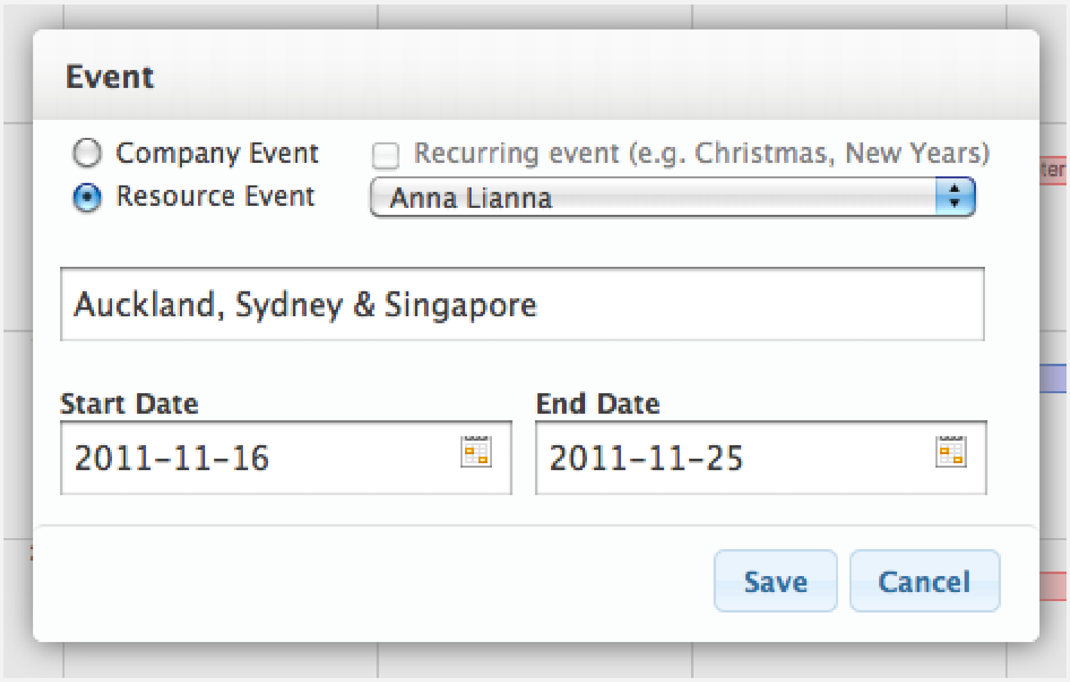


## 2.8 Team Calendar – Resource Events

After adding anyone who will be assigned to work, it's a good idea to add any known vacations or upcoming business travel.

**Additional References**

– How do I start? Go to **Resources Tab -> Team Calendar View**



# 3 Project Construction

## 3.1 Create Project & Save As Template

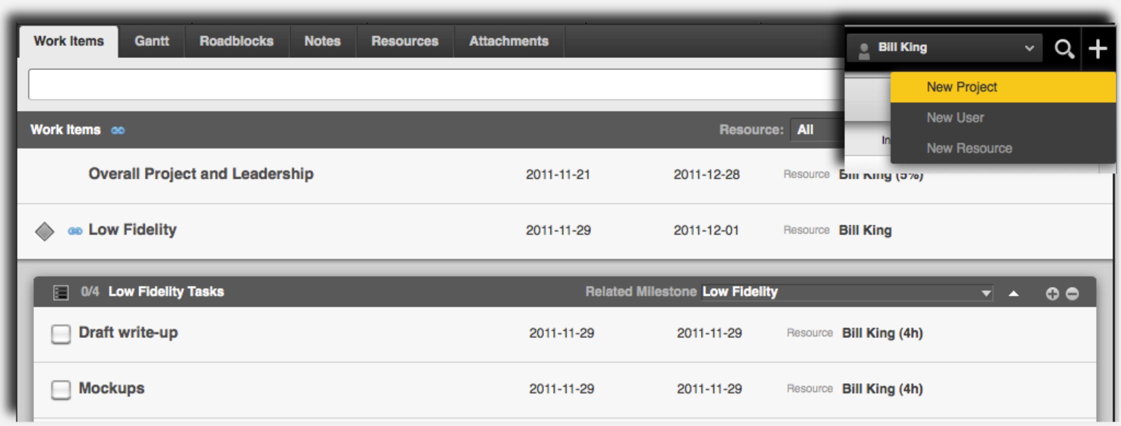
Create a project with the intention of using it as the basis for a project template. If you use Basecamp, complete the **Roadmap** section and then return here. Identify typical or common projects that are implemented on a repetitive basis. If you're a web design and development shop, it could be SEO or WordPress projects. For internally focused organizations, it may be system upgrades or compliance projects.

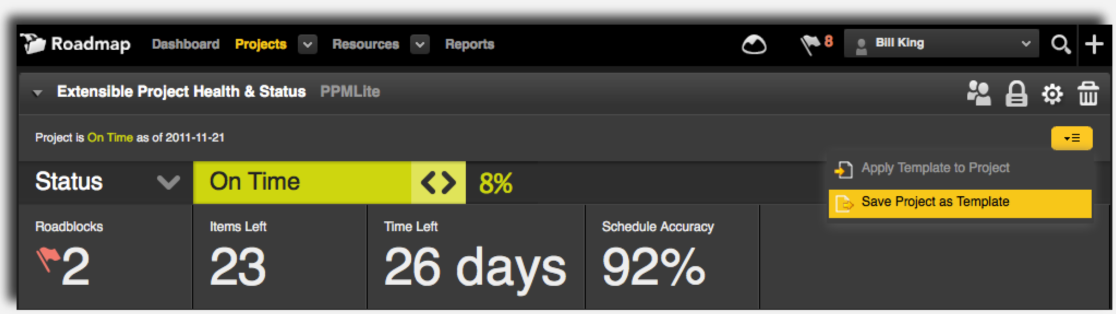
The great thing about Roadmap project templates is that they save just about everything: resource, role, work item duration, work item estimated effort, etc. For example, if your project always has an account executive, business analyst, designer, and web developer doing the same set of tasks, in the same order, with the same dependencies, for the same amount of time, templates help to make you very efficient.

Rinse and repeat as needed for other common projects.

### Additional References

– How do I start? Click **"+"** and select **New Project** menu option. After completing project, expand menu below trash can and select **Save Project As Template**



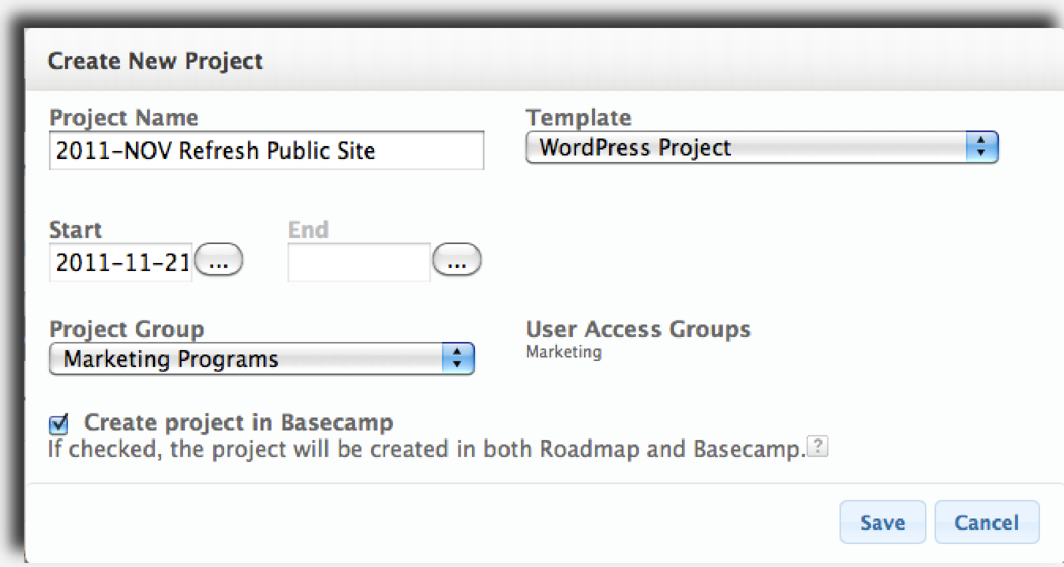
## 3.2 Create Project From Template

Create a new project based off of a template. All you have to do is give it a name and a start date. Click **Create project in Basecamp** if you also use Basecamp. Other options include adding it to an existing Project Group and User Access Group.

Once created, modify the project as needed. See section 3.3 for more details.

### Additional References

– How do I start? Click **"+"** and select **New Project** menu option




## 3.3 Work Items

Work items are planned units of work assigned to a resource.

| Work Item | Description |
|---|---|
| Milestone | A point-in-time like "Code Complete" or a task with duration containing many to-do lists like "Development". A milestone has a start date, due date (start & due date are the same if point-in-time), estimated effort, and one or more responsible party (in Basecamp it can only have one responsible party). |
| To-Do List | A container for to-do items. To-do lists can be associated with a milestone or at the project level. To-do lists do not have a responsible party. |
| To-Do Item | A single unit of work with a start date, due date, estimated effort, and one responsible party. |

# 4 Roadmap + Basecamp

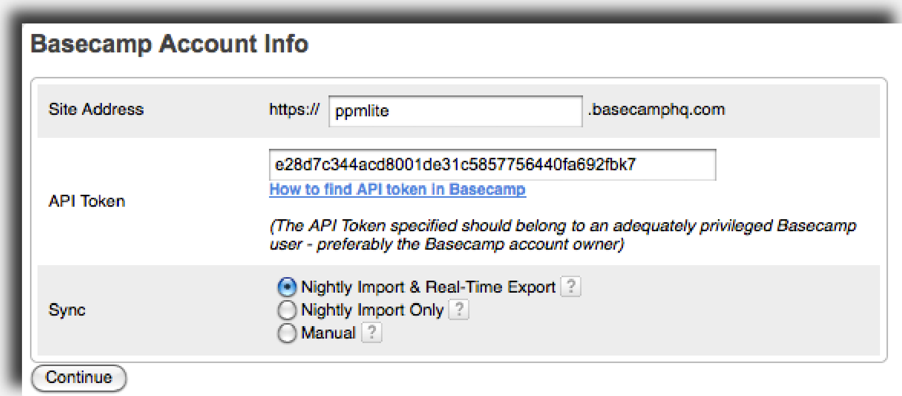
## 4.1 Basecamp Integration

- Enter Basecamp site address https://**site-address-goes-here**.basecamphq.com
- Copy Basecamp API token and paste into Roadmap. Each Basecamp user has a unique API Token, so be sure to select a user who has access to all Basecamp projects (e.g. account owner).
- See section 4.3 for completing the Sync mode

**Additional References**

– How do I start? Go to **Account -> Basecamp Integration** while in another browser window open Basecamp and click on **My Info** (located in upper right)

– Video tutorial: Working With Basecamp (7:18)




## 4.2 Sync vs. Synchronization

Integration between Roadmap and Basecamp is not true synchronization, where changes are made in both systems and the most recent change automatically "wins". The Basecamp API provides a high-level time stamp indicating the last time a project was changed; it does not indicate what exactly changed. For example, Roadmap cannot determine if an existing to-do item was edited or a new file was uploaded; Roadmap only knows that something changed.

What this means is that syncing between Roadmap and Basecamp will overwrite the other system. This, and the fact that the Basecamp API throttles (i.e. enforces a speed limit) on incoming requests, explains why Roadmap offers the nightly import from Roadmap to Basecamp at roughly 2:00 AM. We want you to start the morning with the most recent data.

## 4.3 Roadmap + Basecamp Sync Modes

Choose a sync mode that best suits how you plan to use Roadmap.

- Interactive mode is for small teams with a flat organizational hierarchy:
  - Users can be both individual contributors and managers on the same project
  - Most users have login access to both Basecamp and Roadmap
  - Users add or update project data common to both Basecamp and Roadmap (e.g. milestones and to-dos)
  - Basecamp is used for project collaboration (threaded messages, writeboards & file attachments) and time tracking
  - Roadmap is used for reporting, resource forecasting, Gantt charts, and project & portfolio reviews, and individual resource reviews
  - Select **Nightly Import & Real-Time Export** as sync option
- Interactive mode is for teams with clearly defined roles and responsibilities:
  - Most project activity, collaboration and time tracking is done by individual contributors in Basecamp
  - Fewer Roadmap users than Basecamp
  - Roadmap users consist mostly project managers, senior managers, or PMOs
  - Users add or update common project data in Roadmap as needed, or add / update Roadmap-only fields like roadblocks or project health
  - Roadmap is used for reporting, resource forecasting, Gantt charts, and project & portfolio reviews, and individual resource reviews
  - Select **Nightly Import & Real-Time Export** as sync option because it's important to update Basecamp in real-time
- One-way mode is for managers or PMOs
  - All project activity, collaboration and time tracking is done by individual contributors in Basecamp
  - If changes to common project data are made in Roadmap, user must export to update Basecamp
  - Roadmap is used for reporting, resource forecasting, Gantt charts, and project & portfolio reviews, and individual resource reviews
  - Select **Nightly Import Only** as sync option (assumes projects are created in Basecamp first, then imported into Roadmap; you cannot create a project in Roadmap and Basecamp simultaneously unless real-time export is enabled)

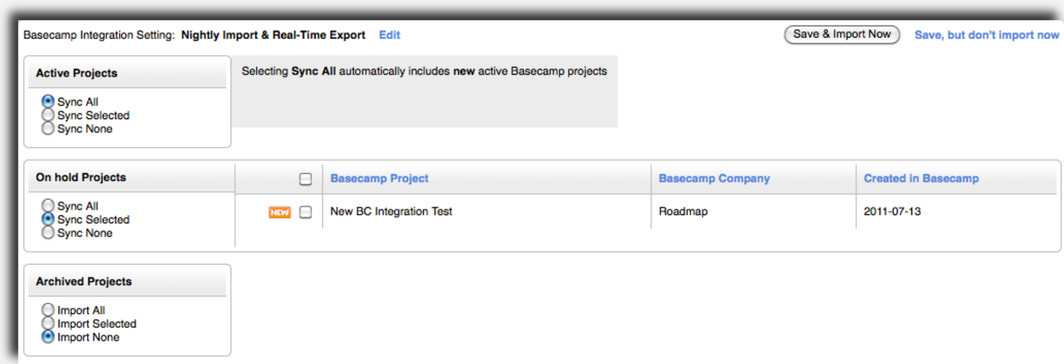
Click **Continue** button and then refer to section 4.4

## 4.4 Select Basecamp Projects

Select **Sync All** for active and on hold projects. Only include archived projects if your intent is to retroactively assign project attributes to closed projects for historical / trend reporting purposes <u>or</u> if you want to import a specific project from which to create a project template.

### Additional References

– How do I start? Go to **Account -> Basecamp Integration** and click **Continue** buton or click the Basecamp logo in the global navigation header




## 4.5 Planned Enhancements to Roadmap + Basecamp Integration

The following enhancements are planned for 2012:

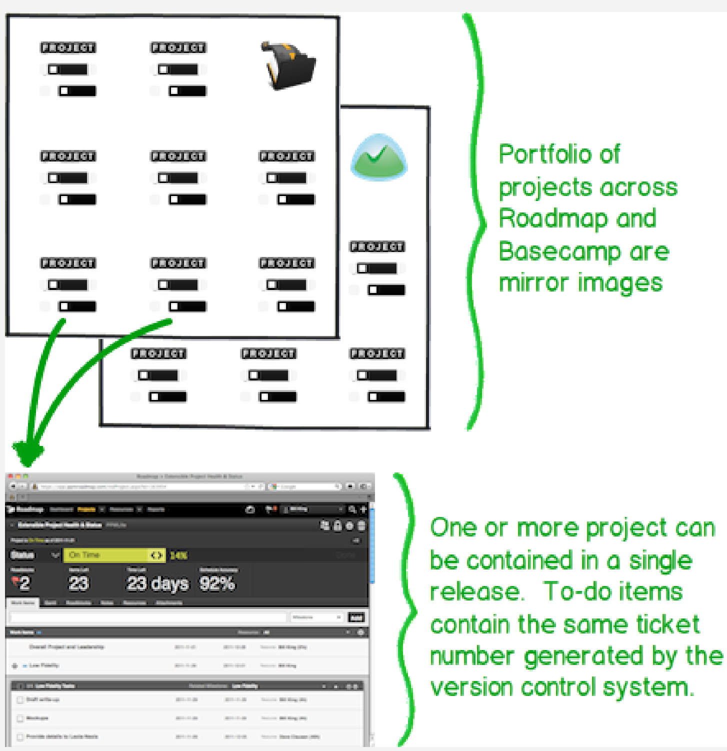
- Ability to link or unlink a Basecamp project from Roadmap at any time, not just when creating a new project
- Basecamp threaded messages with Roadmap Notes. Create new messages or respond to existing messages in one system but propagate to both.
- Ability to non-Basecamp resources to a project in Roadmap even if the resource is not associated with the project in Basecamp
- Time tracking so you'll be able compare forecasted versus actual in one place

# 5 How We At Roadmap Use Roadmap + Basecamp

## 5.1 Overview

- Each feature (or related set of features) gets its own unique project, created in Roadmap and Basecamp simultaneously using a project template. Our project templates are rigid for the early and late phases of a project (requirements, testing and release) but fluid for the middle for obvious reasons.
- We have created the following project attributes:
  - Footprint is a selection value to map the project to an area in the product
  - Strategy is a selection value to map the project to our product roadmap
  - Score is a numeric value to stack rank all active projects; the score can evolve over time as new information becomes available
  - Type is a selection value to distinguish between application, hosting, public website, or backoffice (non-client facing) projects
  - Stage is a selection value that maps to the project lifecycle. Stage = milestone for the bulk of projects so this attribute puts it all under one roof
  - Client Request is a text field with the name(s) of clients who requested it
  - Owner is a selection value for who is ultimately responsible for the project

### Additional References



## 5.2 Individual Projects

- When a new feature has reached critical mass – which we define as having a one-pager containing description, mockup and a clear strategic value – a project is created and placed on hold (in Basecamp) until the project is kicked-off. *[In early 2012 project health and status will become extensible, meaning you'll be able to set a project to, say, future or "parking lot" and determine if resource forecasts are included in reports, Resource 360 page, etc.]*
- Project naming convention is **MMM-YY Footprint Area**, which translates into **OCT-11 HTML5 Gantt**. The month is when the project starts
- Resource forecasting is done in two phases:
  - Pre-development which focuses on getting requirements from low- to high-fidelity or precision
  - After development has begun at which time the development to-do items get created and template-provided to-dos like test plan, test cases get filled out with dates and estimates
- The development team creates tickets in the version control system and then appends each to-do in Roadmap (or Basecamp) with the ticket number, so it looks like **2137 Vertically drag to-do lists between projects**
- Collaboration, time tracking and file sharing is all done in Basecamp
- Roadmap is used for:
  - Project 360 page is used as meeting agenda for project team meetings: % complete, open items, upcoming milestones, and roadblocks
  - Meeting notes are added as messages in Basecamp in their respective projects
  - Resource 360 page is used for 1:1 meetings with team members as needed to adjust workloads
- Project status is set to active until 1) the release is determined to be stable; and 2) any de-scoped features are completed in a follow-on release. If a bug is found after the project is closed, the project is temporarily re-opened until it is fixed.

## 5.3 Project Portfolio Reporting

The management team uses cross-project reporting capabilities for the following:

- Resource forecasting on a role-by-role or individual basis to determine when the project with the next highest score number is ready to start
- Roadblocks indicate an unplanned issue that blocks a project's progress. We try to resolve roadblocks as quickly as possible.
- Looking at schedule audit data to compare and find tendencies of over- and under-estimating how long it will take to deliver a project. It's like an ongoing post-mortem to determine where we can improve accuracy, whether it's better requirements, less scope creep, or less surprises. *Side note: Most of the Roadcrew has worked in large firms where padding the schedule was an art form. A little transparency goes a long way!*
- For those of us who are visual thinkers, using the Dashboard to understand when things start and when they're supposed to be completed.
- Custom views on the Projects Tab to put some structure around aligning the product roadmap (strategic vision) with the projects queued up for the next 12 months.