

Tek Educational

Best Practice Paper:

Project Planning - a key discipline



Project Planning

The successful release of a new product takes months, and sometimes years of careful planning. Many companies decide to outsource activities relating to localized releases for want of sufficient internal linguistic expertise. However, having lavished attention on the native release, companies can then fail to apply the same level of consideration for their localized products. While the supplier's Project Manager (PM) is the project team member whose ultimate responsibility it is to realize a project faultlessly, the end customer will often have a decisive part to play in the effective planning of their project, and can broker crucial product knowledge and interests.

Creating a project plan is the first step in the process after the source materials have been evaluated. Often project planning is ignored in favor of getting on with the work. When carrying out a root cause analysis on a client complaint you might hear the following symptomatic expression: "I didn't have the time to plan, the client needed it urgently and I had to get it into production immediately". However this serves to illustrate the true value of project planning in saving time, money and problems. A client who encourages dialog at an early stage can help ensure that focus is placed on what matters most to them.

Creating the project plan is however only half the exercise, the other key need is the formal inspection of the project plan by the core team and also by other invited stakeholders. We often underestimate the value of getting 'a few heads' around a table to critique a challenging situation in order to uncover all potential issues. The formal project plan inspection is the key to ensuring a tight, robust and doable process. Having a client appraise those "public" parts of their planning may seem daunting to the PM, but it can help to lay a foundation of trust, clearing barriers to communication later in the project. Just as having no project plan is like trying to find your way in a strange city without a map, having a client that is versed in the planned process can be akin to having a guided tour of the same city by a local.

While a client is not in a position to take the lead with project planning, they may help with the following dynamics:

1. Broadening the core team's understanding of the project scope
2. Determining delivery sequence and priorities
3. Providing access to product-specific know-how
4. Managing the expectations of product developers in order to minimize last minute scope changes

With the above support, the Project Manager can focus on the following:

1. Establishing the optimum process and schedule
2. Risk analysis, contingency planning and stress-testing of process
3. Ensuring ownership for tasks within the core team
4. Defining communication, escalation channels and managing the client's expectations
5. Ensuring Quality Assurance at all stages
6. Allocating and managing to budget

Project Scheduling

When scheduling a localization project, it is first necessary to define all tasks and activities. Most of this information should be generated from a thorough project evaluation. Detailed scheduling can only be performed once final source materials have been received and analyzed. In addition to the materials for translation, a client's final handoff may include existing translation memories, style guides, approved terminology glossaries/reference materials, beta and previous product versions. A client who empathizes can ensure its partner PM hits the ground running by providing an organized handoff with clear and ample instructions describing expectations on deliverables.

Once tasks and activities are defined, the PM then needs to consider other aspects of the project that are critical to creating an accurate project schedule:

1. **Dependencies:** Localization projects often contain dependencies which need to be managed carefully. For example, final delivery is clearly dependent upon having received final frozen source materials.
2. **Sequence of activities:** Meaning that once all activities and dependencies have been listed, activities need to be arranged in a logical sequence, carefully considering dependencies and performing tasks concurrently where possible.
3. **Duration of activities:** It is important to factor the duration of each project activity in planning. The PM needs to balance many factors which can influence productivity levels, such as the complexity, quality and consistency of the source material, the file formats of the source, the tools used and last but not least the linguistic assets either provided by the client or to be created by the supplier.
4. **Assigning resources:** The combination of volumes, timeframes, availability of expertise and quality of source materials will dictate the type and number of resources to be assigned to a particular task. Centralizing some activities has the advantage of leveraging experience across languages but may cause bottlenecks towards the end of the project if all languages need to be delivered at once.
5. **Milestones:** In localization projects a milestone is usually a point in time where a predefined set of deliverables is ready, such as the delivery of interim files to validation by the client's in country experts. Project milestones will be linked to dates and the project activities will be scheduled between milestones. Nothing grinds a project to a halt as quickly as a validator who does not communicate in a timely manner. The client can help re-energize a stagnating project by exerting their influence internally where this happens and monitoring scheduled milestones carefully.
6. **Budgeting:** Managing the project financials so that the target gross margin is achieved is critical to the Localization Service Provider (LSP's) long-term success, although it is often overlooked in the effort to deliver and satisfy the client. It is also in the client's interest that a fair market price is paid for services rendered. Again effective Planning at the outset should provide the key profitability targets, and subsequent management should ensure achievement to those targets.

At any of the above planning stages, the PM may come to the client with suggestions or questions. A responsive client can help a project achieve lift-off more quickly. The following is a typical scenario: It can take a seasoned PM to accurately assess how much time before final delivery the source files need to be frozen. The PM may then also have the unenviable task of explaining this to an expectant client if dependencies are unclear at the scheduling phase. If a client and localization PM already have a good understanding of what these dependencies are, there are likely to be fewer "nasty surprises" for both parties.

Quality Management and quality planning

Quality Assurance steps need to be planned into every step of the project, not just at project completion. Many LSP's now have their processes accredited by well known organizations. This can provide confidence that processes are robust. Planned QA steps can include:

- Integrity check of the client's handoff using methods such as pseudo translation
- Qualifying and testing potential project team members
- Early sample checks on translated materials and managing through established KPIs
- Testing/linguistic QA to determine if any issues arise in context at run-time.

The two most common translation quality assessment tools are the LISA QA (Localization Industry Standard Association) Model and the DIN 2345 translation quality standard. The LISA QA model consists of reference manuals and templates which enable measurement of language and functionality of localized components. When scrutinizing a PM's planning, it is in a client's interest to look for adequate planning of quality steps, and perhaps to become familiar with industry standards.

Communications through the execution cycle

A good communication plan should answer the following questions:

- Where can project information be found? How will updates to the information be distributed?
- Who will receive specific information and how often? For example, status reports and schedules. Who should form part of which distribution list?
- Who can answer questions on different aspects of the project, for example on terminological issues? Who will serve as a backup if the main contact is not available?
- Where will questions and answers be stored for future reference for all project stakeholders?
- Who will communicate with the client?
- Who is the final decision maker in case of conflicts?

Establishing clear agreements on deadlines, possible updates and status reporting at the start of the project will help in preventing most misunderstandings or conflicts. PMs should ensure that revised project milestones are clearly communicated through regular status reports and conference calls. A client who makes time for regular calls, and who reads status information is in a good position to manage in the throes of a busy project.

As discussed at the start of this paper, if the formal inspection of the Project Plan is completed effectively many potential pitfalls can be dealt with seamlessly in the course of the project. Engaging your LSP in the dialogue surrounding planning and scheduling can build a more robust process, while the support that a client can give by managing expectations within their own organization can foster a healthy open relationship on both sides, resulting in happy customers and successful multilingual releases.

About Tek Translation International

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