A Case Study In Project Management

A CMLS Technology Section Council White Paper

A Case Study In Project Management

A CMLS Technology Section Council White Paper

A Case Study In Project Management is a CMLS Technology Section Council white paper that covers how some MLSs leverage technology to improve the effectiveness of MLS project management. This white paper shares some of the tactics and techniques of Patrick Williamson, a CMLX2 graduate, at My Florida Regional MLS.

Written by CMLS business parter Victor Lund, partner at WAV Group and CEO of RE Technology, in collaboration with Patrick Williamson, vice president of development and operations with My Florida Regional MLS, and published by the Council of Multiple Listing Services.

Background

About My Florida Regional MLS

My Florida Regional MLS (MFRMLS) is a regional Multiple Listing Services provider based in Orlando, Florida. Its service area covers central Florida and the most densely populated area along the state's west coast. The company provides services to a subscriber base of more than 50,000 real estate agents and brokers across 14 shareholder associations. It lends some services to three others. MFRMLS is one of the largest providers of Multiple Listing Services in the world.

OUR SHAREHOLDER ORGANIZATIONS:

1. Bartow Board of REALTORS®, Inc.
2. East Polk County Association of REALTORS®
3. Englewood Area Board of REALTORS®
4. Greater Tampa REALTORS®
5. Lakeland Association of REALTORS®
6. Orlando Regional REALTOR® Association
7. Osceola County Association of REALTORS®
8. Pinellas REALTOR® Organization
9. Punta Gorda-Port Charlotte-North Port Association of REALTORS®
10. REALTORS® Association of Lake & Sumter Counties
11. REALTOR® Association of Sarasota & Manatee
12. Venice Area Board of REALTORS®
13. West Pasco Board of REALTORS®
14. West Volusia Association of REALTORS®

CUSTOMER ORGANIZATIONS:

15. Central Pasco Association of REALTORS®
16. East Pasco Association of REALTORS®
17. Lake Wales Association of REALTORS®
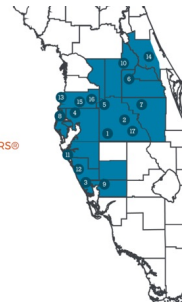
MFRMLS also has a team of project managers led by Patrick Williamson. Williamson earned a Project Management Professional (PMP) certification from the Project Management Institute.

About The Project Management Institute

Project Management Institute (PMI) certified executives lead projects in nearly every country around the world. The program was developed for companies that have adapted many principles of project management, including approaches such as Scrum, Kanban, Lead, extreme programming, and test-driven development.

Project Management Professional (PMP) certification requires a 4-year degree along with 4,500 hours of project management involvement (or 7,500 hours without a 4-year degree), 35 hours of project management education, and the successful completion of a rigorous certification exam. PMPs are also required to earn 60 professional development units every three years. For more information, visit the Project Management Institute.

Overview

While MLS providers have varied staffing capabilities in the United States, only the largest MLSs in the nation seem to be able to afford highly trained full-time project managers. For the most part, these project managers collaborate between the MLS and its vendors.

Appreciating this, Williamson provided one example of a project plan developed to launch ePropertyWatch, a product offered by CoreLogic as a free service to MLSs. The project management techniques applied in the scheduling and launch of eProperty Watch can be considered a best practice applicable to MLSs of all sizes.

Even if your MLS may not have a dedicated project manager, your organization is still involved in project management. A common critical component of successful project management, for example, is defining what needs to be done and how it is going to be done. Once these items are defined, someone has to develop a plan and manage the scope and schedule of the project, especially as inevitable changes occur.

Like most management models, Williamson identified processes that serve to organize the ongoing activity of the project — planning, executing, and controlling. Each process may also include additional steps within the project, such as initiating and closing, but each must be clearly defined.
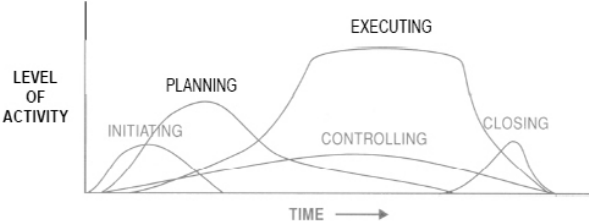
ePropertyWatch Plan Outline

Initiation and Planning

    Create Charter and Stakeholder Assessment

    Identify and Document Requirements

    Scope Work and Conduct Risk & Opportunity Assessment

    Create High Level Plan

    Conduct Project Kickoff Meeting

Executing, Monitoring and Controlling

    Implement in Staging Environments

    Create QA Plan

    Conduct QA

    Review QA Results Report from Staging

    Implement in Production Environment for QA

    Conduct QA in Production Environment

    Review QA Results Report from Production

    Create Training Documentation

    Create Support Center Documentation

    Create Marketing Plan and Materials

    Conduct Go/No-Go Meeting

    Send Association Staff Coming Soon Communications

    Conduct Staff Training

    Send Customers Coming Soon Communications

    Send Association Staff Pre-Launch Notice

    Launch Day

     Expose Product Links to Customers

     Conduct Post Launch QA

   Send Launch Day Communications

Closing

    Conduct Lessons Learned

Defining Timelines

Every step in a project needs to be clearly defined and assigned an estimated time of completion in advance of the project launch. The overall timeline for this project is 83.75 hours. Time estimates were based in part on experience.

Here are the some details of how each step in the ePropertyWatch project are defined, assigned to a responsible party, and provided a time estimate. In addition to this information, MFRMLS scoped the work effort and conducted the risk/opportunity assessment, which was critical to the success of implementation.
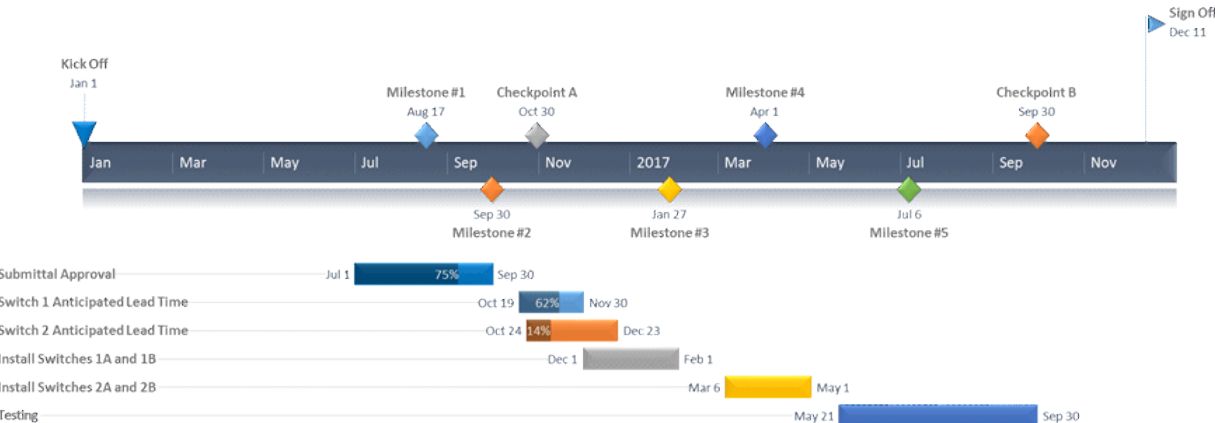
ePW Plan Timeline		83.75 hrs
Initiation and Planning		**14 hrs**
Create Charter/Stakeholder Assessment	Sponsor, Project Manager	4 hrs
Identify and Document Requirements	Vendor, Sponsor, Project Manager	3 hrs
Scope Work and Conduct Risk & Opportunity Assessment	Scope Work and Conduct Risk & Opportunity Assessment	4 hrs
Create High Level Plan	Project Manager, Vendor	2 hrs
Conduct Project Kickoff Meeting	Project Manager, Marketing Coordinator, QA Technician, Sponsor, Trainer, Vendor	1 hr
Executing, Monitoring and Controlling		**53.75 hrs**
Implement in Staging Environments	Vendor	8 hrs

Create QA Plan	QA Technician, Vendor	4 hrs
Conduct QA	QA Technician	6 hrs
Review QA Results Report from Staging	Project Manager, Vendor, QA Technician	1 hr
Implement in Production Environment/QA	Vendor	8 hrs
Conduct QA in Production Environment	QA Technician	3 hrs
Review QA Results Report from Prod	Project Manager, Vendor, QA Technician	0.5 hrs
Create Training Documentation	Trainer, Vendor	6 hrs
Create Support Center Documentation	Project Manager, Vendor, Support Center Manager	1.5 hrs
Create Marketing Plan and Materials	Marketing Coordinator, Vendor	8 hrs
Conduct Go/No-Go Meeting	Project Manager, All Department Managers, Sponsor, Marketing Coordinator, Trainer, QA Technician, Support Center Manager	1 hr
Send Association Staff Coming Soon Communication	Marketing Coordinator	.25 hrs
Conduct Staff Training	Trainer, Staff	3 hrs
Send Customers Coming Soon Communication	Marketing Coordinator	0.25 hrs
Send Association Staff Pre-Launch Notice	Marketing Coordinator	0.25 hrs
Launch Day		**3 hrs**
Expose Product Links to Customers	Vendor	1 hr
Conduct Post Launch QA	QA Technician	1 hr
Send Launch Day Communication	Marketing Coordinator	1 hr
Closing		**1 hr**
Conduct Lessons Learned	Project Manager, Marketing Coordinator, QA Technician, Sponsor, Trainer, Vendor	1 hr
Project Management Task/Bucket	Project Manager	15 hrs

As you can see from the detail of this project, many responsibilities were shared among the various departments at MFRMLS. These responsibilities were overseen by the executive in charge, which MFRMLS identifies as a "sponsor."

Along with the sponsor, a project manager serves as the lead orchestrator of the daily activities. He or she acts as a supervisor over all aspects of a project, ranging from the initial task assignment to final accountability.

In this case, the project also includes a vendor. Those responsibilities belong to CoreLogic, developers of ePropertyWatch.

Another principal player is the marketing coordinator. This person is responsible for all creative and communication materials that will be required to launch the project. This would include simple collateral material such as flyers or larger promotional efforts, such a digital campaign, as needed.

The trainer is responsible for developing an ePropertyWatch training program. Such programs are typically divided into training programs needed at the onset of a project launch and are needed to sustain the product as a valued member benefit.

The quality assurance technician is responsible to make sure that the product is properly tested before the launch. The support center manager is also involved to ensure the proper handling of the product's implementation and operations.

Tracking Projects To Completion

While most plans are written to assume a perfect world, reality requires certain contingencies are built into the plan. One way to handle a contingency event is to create a predecessor, which is defining what needs to happen before something else happens.


As you see on the next page, MFRMLS provided an estimated percentage of completion for each step of the project. Along with tracking the percentage of project completion, it is considered a best practice to also track start and stop times to review actual time vs. estimated time.

Task Name	Predecessors	% Comp.	Duration	Start	Finish
ePW Plan		**100%**	**40.61 days?**	**Tue 1/3/17**	**Tue 2/28/17**
Initiation and Planning		**100%**	**4.83 days?**	**Tue 1/3/17**	**Mon 1/9/17**
Create Charter and Stakeholder Assessment		100%	0.25 days?	Tue 1/3/17	Tue 1/3/17
Identify and Document Requirements	2FS+1 day	100%	0.19 days?	Wed 1/4/17	Wed 1/4/17
Scope Work and Conduct Risk & Opportunity Assessment	3FS+1 day	100%	0.25 days?	Thu 1/5/17	Thu 1/5/17
Create High Level Plan	4FS+1 day	100%	0.13 days?	Fri 1/6/17	Fri 1/6/17
Conduct Project Kick Off Meeting	5FS+1 day	100%	0.02 days?	Mon 1/9/17	Mon 1/9/17
Executing, Monitoring and Controlling		**100%**	**30.78 days?**	**Mon 1/9/17**	**Tue 2/21/17**
Implement in Staging Environments	6SS	100%	1 day	Mon 1/9/17	Tue 1/10/17
Create QA Plan	6FS+1 wk	100%	0.25 days?	Mon 1/16/17	Tue 1/17/17
Conduct QA	9FS+1 day	100%	0.75 days?	Wed 1/18/17	Wed 1/18/17
Review QA Results Report from Staging	10	100%	0.04 days?	Wed 1/18/17	Wed 1/18/17
Implement in Production Environment for QA	11FS+1 day	100%	1 day	Thu 1/19/17	Fri 1/20/17
Conduct QA in Production Environment	12FS+1 day	100%	0.38 days?	Mon 1/23/17	Tue 1/24/17
Review QA Results Report from Prod	13	100%	0.02 days?	Tue 1/24/17	Tue 1/24/17
Create Training Documentation	14FS+1 day	100%	0.38 days?	Wed 1/25/17	Wed 1/25/17
Create Support Center Documentation	15SS	100%	0.06 days?	Wed 1/25/17	Wed 1/25/17
Create Marketing Plan and Materials	16SS	100%	1 day	Wed 1/25/17	Tue 2/7/17

Conduct Go/No-Go Meeting	14FS+3 days, 15FS+3 days, 16FS+3 days, 17FS+3 days	100%	0.07 days?	Fri 2/10/17	Fri 2/10/17
Send Association Staff Coming Soon Communication	18FS+1 day	100%	0.03 days?	Mon 2/13/17	Mon 2/13/17
Conduct Staff Training	18FS+1 day	100%	0.19 days?	Mon 2/13/17	Tue 2/14/17
Send Customers Coming Soon Communications	20	100%	0.03 days?	Tue 2/14/17	Tue 2/14/17
Send Association Staff Pre-Launch Notice	21FS+4 days	100%	0.03 days?	Mon 2/20/17	Mon 2/20/17
Launch Day		**100%**	**0.38 days?**	**Tue 2/21/17**	**Tue 2/21/17**
Expose Product Links to Customers	22FS+1 day	100%	0.13 days?	Tue 2/21/17	Tue 2/21/17
Conduct Post Launch QA	24	100%	0.13 days?	Tue 2/21/17	Tue 2/21/17
Send Launch Day Communication	25	100%	0.13 days?	Tue 2/21/17	Tue 2/21/17
Closing		**100%**	**0.02 days?**	**Tue 2/28/17**	**Tue 2/28/17**
Conduct Lessons Learned	26FS+1 wk	100%	0.02 days?	Tue 2/28/17	Tue 2/28/17
Project Management Task/ Bucket	2	100%	1.88 days	Tue 1/3/17	Thu 1/5/17

Flexible Schedules

One of the principles of project managing is called team calendaring. Since most people who own tasks endeavor to schedule their work and stay on track, changes in the timing of predecessors have a waterfall effect on the planning and scheduling of future tasks.
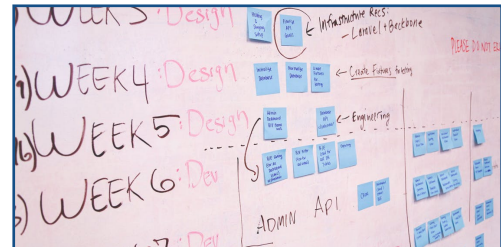
For example, if a user has a task that is due on the Friday before an event but the predecessor task is not complete, then the entire project timeline will be altered. It is important to allow for not only the additional time to complete the predecessor, but also other scheduling conflicts (such as a project manager being out of the office or another previously scheduled project). This means a one day delay could potentially delay a project for four or five days as the waterfall effect impacts tasks and timelines down the line.

An important best practice in project management, and the hardest thing to manage, is not only planning your work but working your plan. The best project managers are able to work with an agile, elastic workflow. In real life, things happen faster or slower than estimated.

A key job of the project manager is coordinating changes that impact scheduling and timelines. In the case of MFRMLS and other MLSs, this can be very complex when managing multiple projects at the same time.

Expect from the onset of any project that assignments, deliverables, and dates are likely to change on a daily basis. By observing the best practice of agile planning, uncontrollability and flexibility are factored into the plan and adjustments are made on a daily basis.

Feel free to download this spreadsheet of the full project plan for launching ePropertyWatch. You can use this as a template for other projects.

Conclusion

Project management best practices are key to operating an efficient and effective multiple listing service. Recognizing that every organization is structured differently, with varied staff and capabilities, MLSs may have to establish a benchmark suitable to their structure rather than the one set by MFRMLS.

What is important to remember is that the key principle of successful project management requires proper planning, communication, and execution. Thinking through the project plan in anticipation of a product launch is an imperative foundation for setting expectations around product or service delivery.

When organizations fail to set the right expectations, even projects that require months to complete will begin to feel long and drawn out under the best of circumstances. By communicating expectations up front and then keeping subscribers or members up to date on the progress being made — whether by daily messaging services or newsletters — project stress is typically reduced, performance improved, and the question "when will it be ready" never asked by those who know the answer.

CMLS Technology Section Council

The CMLS Technology Section Council works to improve industry standards through the development and establishment of MLS Best Practices as they relate to Technical and Information Technology (IT). This includes technologies that range from copiers, phone systems, networks and automated support services to MLS systems and other software that promotes productivity, responsiveness, and profitability.

For more information about CMLS or the CMLS Technology Section Council, visit councilofmls.org.