Chapter Nine:
Running Your Project in a PSA

With luck, you've invested in some kind of ticket-tracking system or Professional Services Automation tool (PSA). You might also call it your service board. It could be something you built or something you bought.

This chapter covers how to manage the project inside the service board or PSA. We're going to use those terms interchangeably. You will just substitute whatever you're using.

We will not discuss all the other things you could be doing (should be doing) in your PSA, such as client management or contract management. We care about two things in this chapter:

- Tracking labor as accurately as possible
- Tracking progress for the project

Translating The Scope Into Tickets

The Scope of the Project IS the Project!

Remember the discussion from Chapter Three and other early chapters: Scope creep kills projects! Once you have an approved project, there is a natural progression from project definition to project completion.

In a perfect world, each of the line items in your Internal Quote will flow through to the External Quote you give to the client. And in that perfect world, each of these line items will become a service ticket in your PSA or job board.
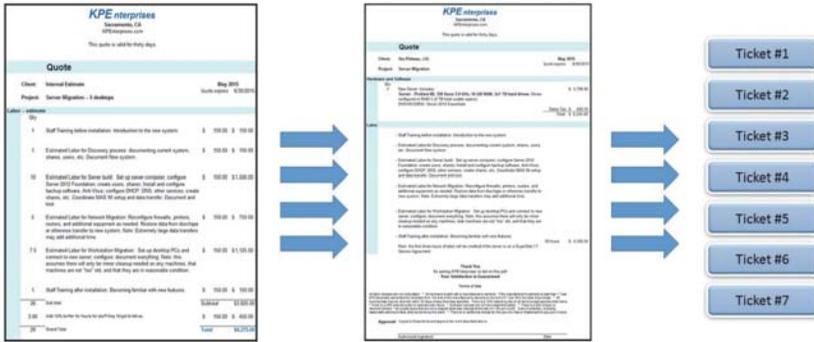
9-1: Flow from Internal Quote to External Quote to Tickets

So, let's say that you're migrating a server. You might have the following line items that become individual tickets:

1. Training (before and after)
2. Discovery
3. Server Build
4. Data Migration
5. Workstation Migration
6. Network Updates

Internally, you've already created time estimates for each of these items (see previous chapter). So you can put time estimates into the service tickets. Two hours for training, ten hours for server build,

etc. Resist the urge to re-estimate at this time. It's important that you put the same time estimates into the ticket as you have in your Internal Quote. That way you can track how accurate your estimates are!

Each ticket will have a Title or Short Description. It's a good idea to name your tickets so that they are all grouped together when you sort tickets by name. That way, this project won't get lost in your service board if you have hundreds of other tickets. For example:

- Migration Project 1 – Training
- Migration Project 2 – Discovery
- Migration Project 3 – Server Build
- etc.

At this point, you'll have a set of tickets that "are" this project inside your service board. The total hours allocated to these tickets represents the hours allocated to the project. And, of course, the total hours worked on these tickets represents the total hours worked on the project.

Tickets Outside the Scope

Karl likes to joke in project trainings that every technician should two tattoos – one on each arm:

Inside the Scope

and

Outside the Scope

Every action you take for this client is either inside the scope of this project or outside the scope of the project. Every technician needs to understand that and understand the scope. So when a user (or your principal contact) asks to do something related to the scope, they need to be very clear about what IS and what IS NOT inside the scope of the project.
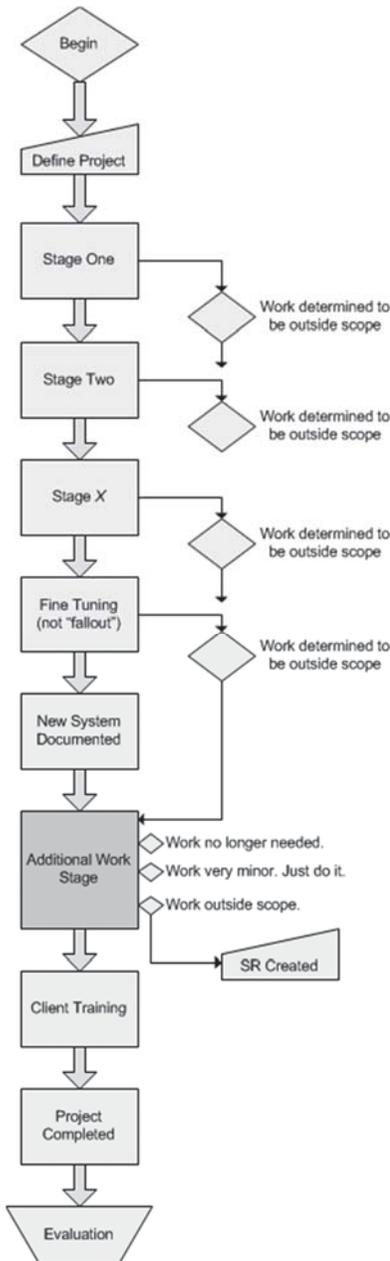
In larger organizations, changes and additions are handled by a more formal "change order" process. But in smaller businesses and smaller projects, we handle this much more easily. If something is outside the scope of the project, you simply create a new service request.

On the next page we've reprinted the flow chart from Chapter Three.

Luckily, there are only a few kinds of issues that can come up during any SMB project. About 99% of all issues that arise fall into these three categories:

1. Fixed by the project. These are issues that are directly related to the project, but should be eliminated once the project is complete. For example, if someone has intermittent problems connecting to a server share, that better be fixed when the new server installation is complete.

2. So small you go ahead and include it. Sometimes a request will literally take a few minutes. For example, "Can you put a shortcut to that on my desktop?" You can go ahead and fold these niceties into the project.

But beware of "death by a thousand paper cuts." Some clients just have a way of adding tiny things again and again until they become a significant amount of labor. Your service manager or project

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        ┌─────────┐
        │  Begin  │
        └─────────┘
             │
             ▼
     ┌───────────────┐
     │ Define Project│
     └───────────────┘
             │
             ▼
     ┌───────────────┐
     │   Stage One   │─────────┐
     └───────────────┘         ◇  Work determined to
             │                    be outside scope
             ▼
     ┌───────────────┐
     │   Stage Two   │─────────┐
     └───────────────┘         ◇  Work determined to
             │                    be outside scope
             ▼
     ┌───────────────┐
     │   Stage X     │─────────┐
     └───────────────┘         ◇  Work determined to
             │                    be outside scope
             ▼
     ┌───────────────┐
     │ Fine Tuning   │─────────┐
     │ (not "fallout")│        ◇  Work determined to
     └───────────────┘            be outside scope
             │
             ▼
     ┌───────────────┐
     │  New System   │
     │  Documented   │
     └───────────────┘
             │
             ▼
     ┌───────────────┐   ◇ Work no longer needed.
     │Additional Work│   ◇ Work very minor. Just do it.
     │     Stage     │   ◇ Work outside scope.
     └───────────────┘
             │              ┌─────────────┐
             │─────────────▶│ SR Created  │
             ▼              └─────────────┘
     ┌───────────────┐
     │Client Training│
     └───────────────┘
             │
             ▼
     ┌───────────────┐
     │    Project    │
     │   Completed   │
     └───────────────┘
             │
             ▼
        ╲ Evaluation ╱
```

manager should be involved in all decisions to include these "little" things in the project.

Scope creep can creep up very quickly because it's a sneaky thing!

3. Clearly outside the Scope. All other requests are outside the scope of this project. The only option is to create a new service request (ticket).

At some point, your service manager will review these tickets with the client. Some will be urgent, some will be covered by a managed service agreement. Some will cost the client money. Some will rejected by the client as unnecessary.

All of them will be outside the scope of this project.

New Urgent Work

Let's say that one of these out-of-scope service requests must be executed in the middle of your project. It is critical that you keep the labor straight.

In other words, you need to stop entering time on the project tickets