

# Effective Project Management

How to Grow High-Value Partnerships



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# Getting Started



# New Business: Internal Sales Handoff



# Scheduling Kickoff Workshop

## New Engagement for Existing Client

To: **Susan**

Subject: **Kicking Off Our Project!**

Hey Susan!

We're excited to be working with you!

To get started, we need to cover a few things so we can have a successful project.

I wanted to ask you a few questions...

**Who should attend the kickoff workshop?**

Ask for names, titles and email addresses.

**When should the kickoff workshop take place?**

Include a link to a scheduler or list of times for the client to select.

**Does anyone on your team require accommodations?**

Inclusion/Accessibility requirements and inclusivity statement.

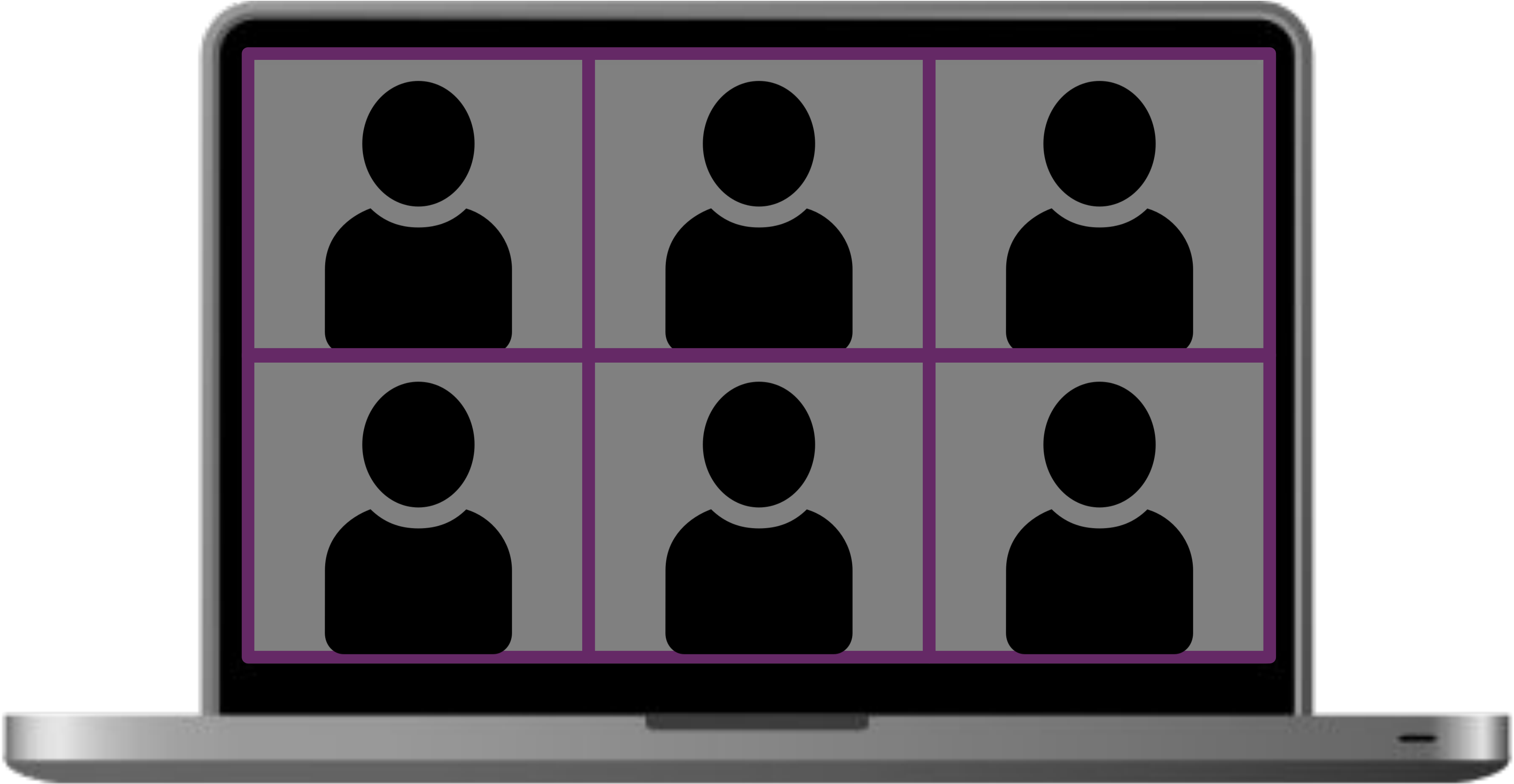


**What do your initial  
communications look like?**



# Kicking Off

# Kickoff Workshop (Client Facing)



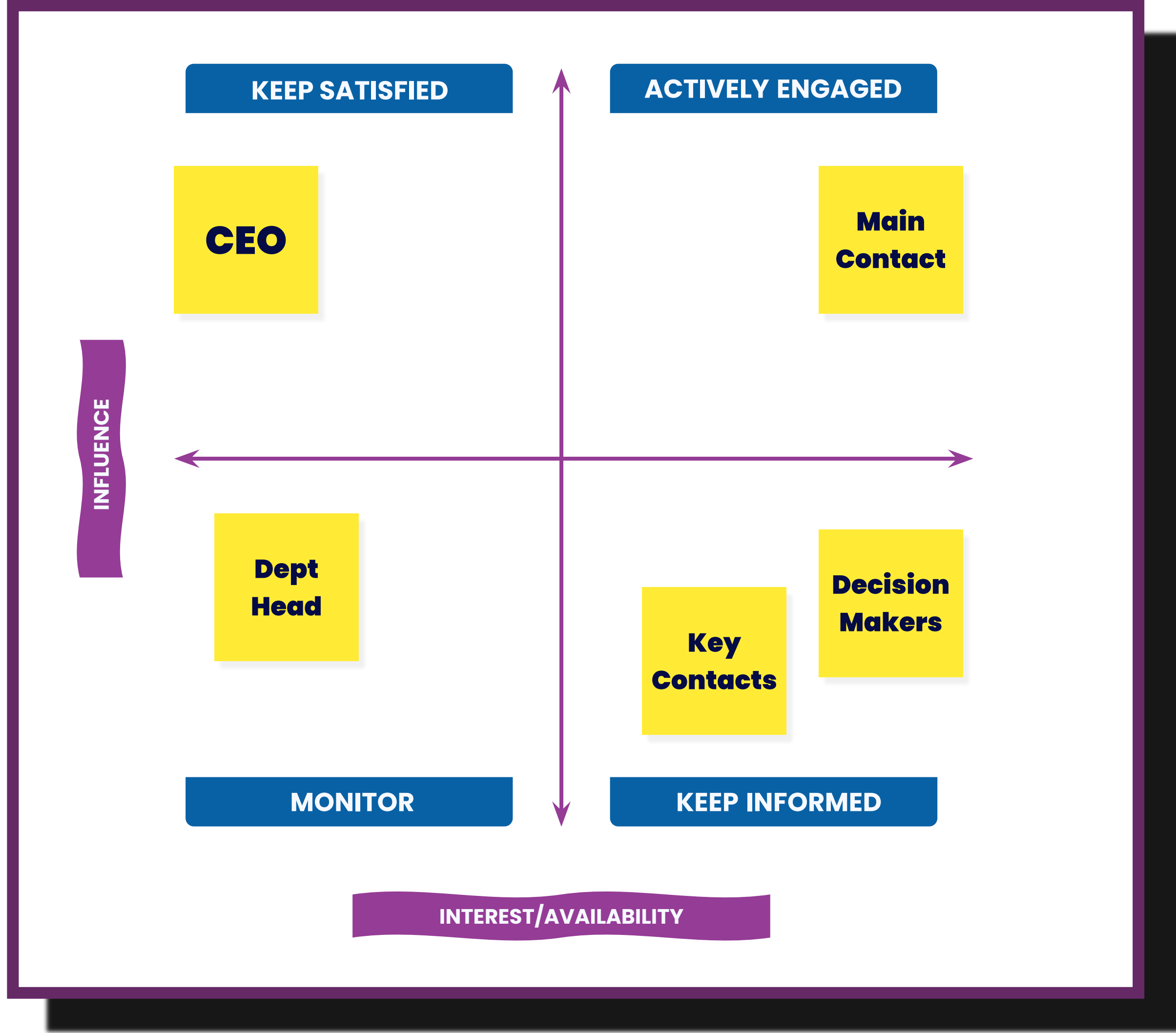
# Internal Kickoff (Ra-Ra)





# Keep it Going

# Stakeholder Analysis/RACI



Scan for  
Miro Template

# Next Steps Email

To: **Jeff**

Subject: **What's Next?**

Hey Jeff!

Please extend my thanks to your team for their participation in the Kickoff Workshop today. It was great to get to know everyone just a little bit better and have an item to start digging into right away! :)

Here are some next steps...

## **What did you cover during Kickoff?**

Provide a brief value statement and/or list.

## **What are some immediate next steps?**

Here is your opportunity to set some expectations about what value you intend to provide next or what you need from the client in order to move forward.

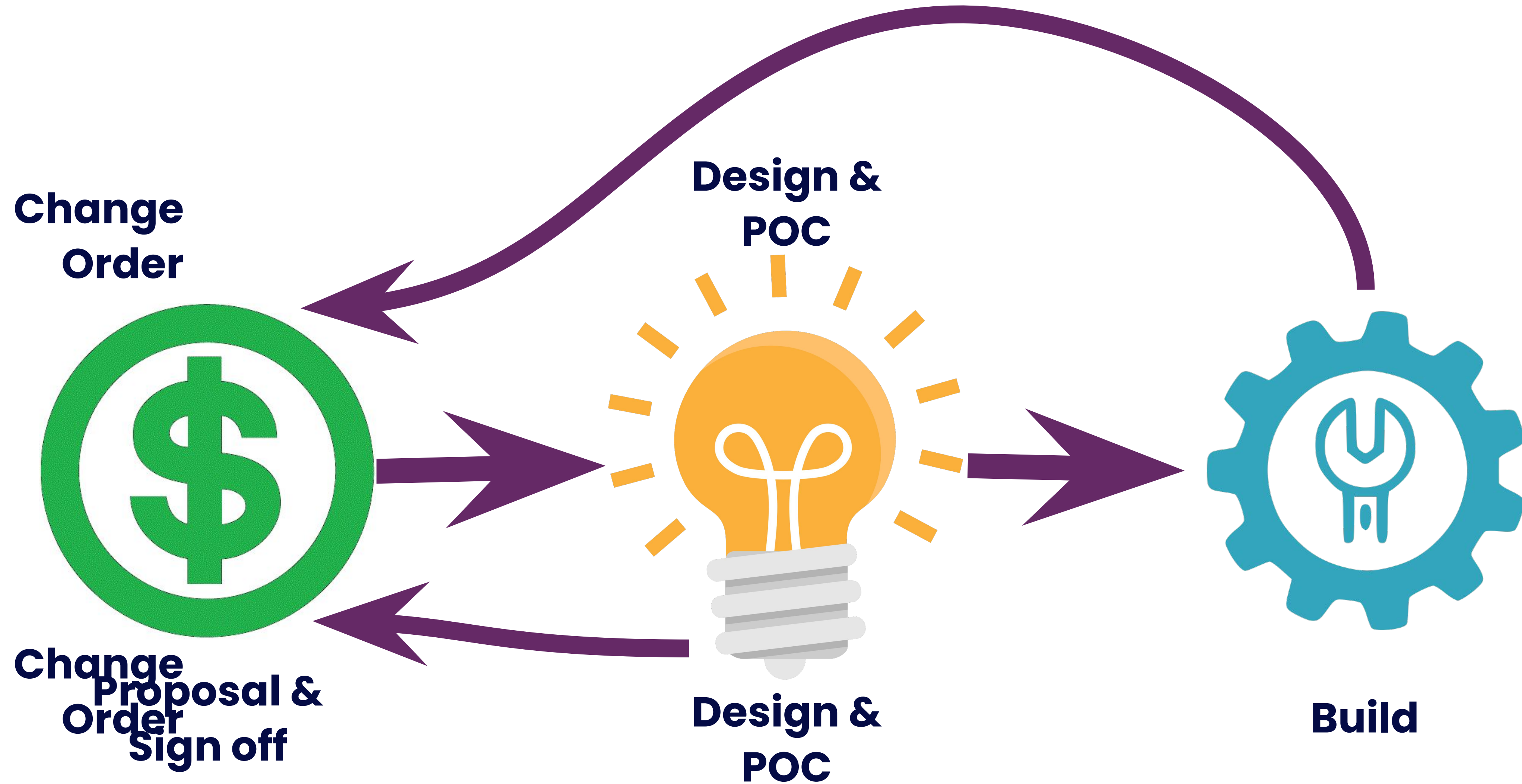
## **When will you meet next/what's the next milestone?**

As the team starts digging in, it is good to remind everyone about the next meeting and/or milestone. Remember, not everyone things multi-dimensionally, a calendar invite or graphic during the meeting might not be enough.



# Discovery First

# A world without a Discovery-first Approach



The background features a dark purple color with large, light purple letters 'Q', '&', and 'A' arranged horizontally. Various stylized human figures are scattered around and interacting with these letters. Some are sitting on the letters, some are holding smartphones, and one is using a laptop. The overall theme is digital connectivity and user experience.

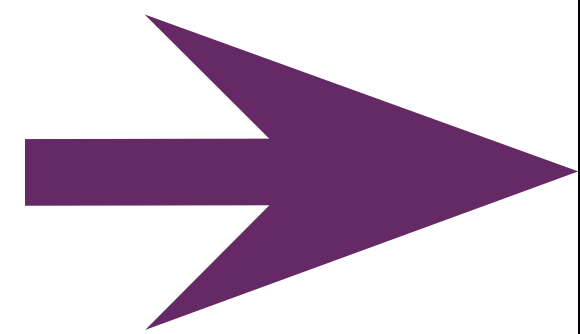
**Has anyone experienced this  
before?**



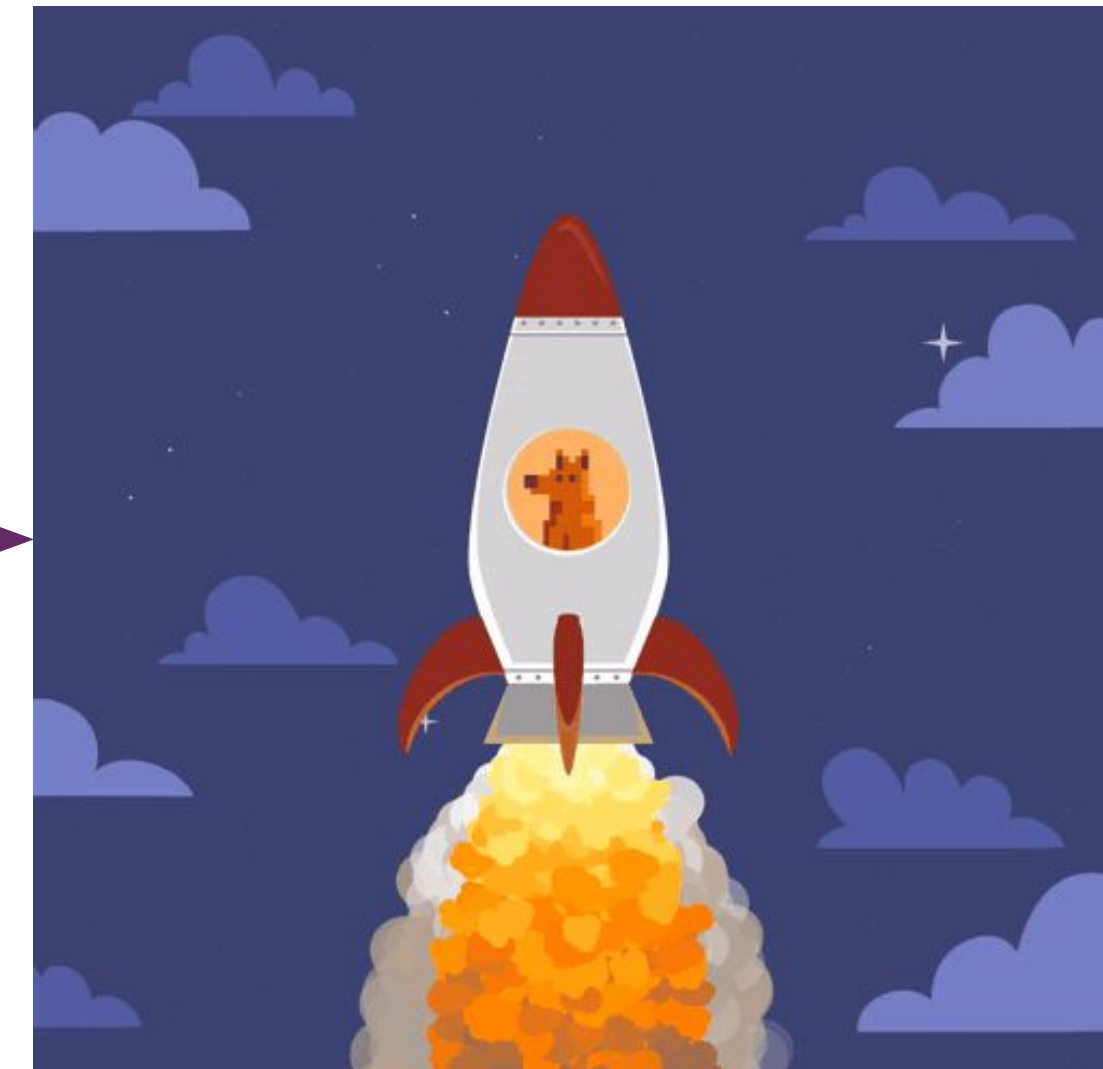
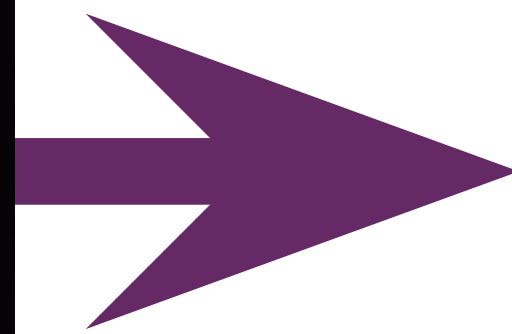
# Empowering Decision Makers With a Discovery-first Approach



**Requirements  
&  
Envisioning**



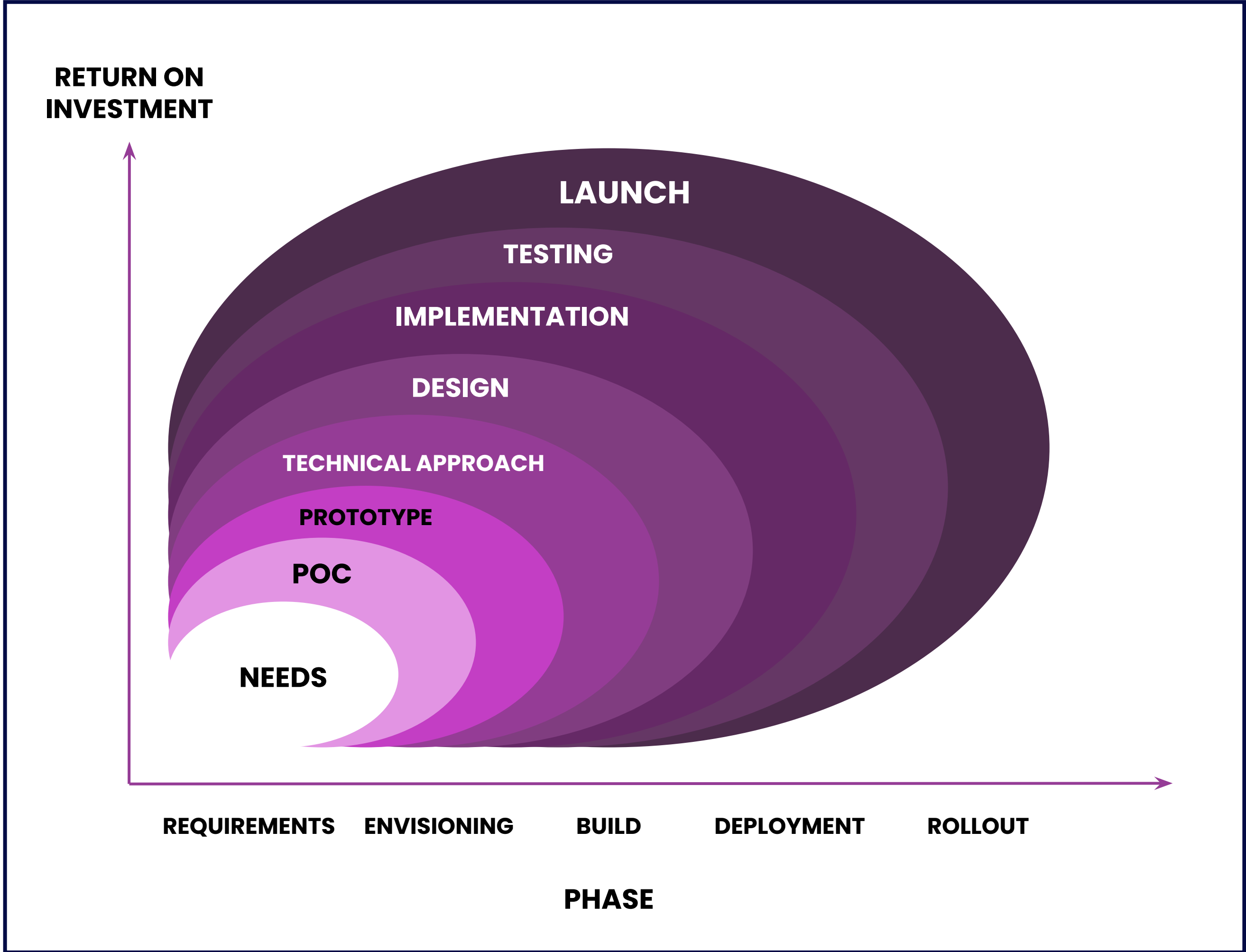
**Build**



**Deploy &  
Rollout**

# Phased Approach

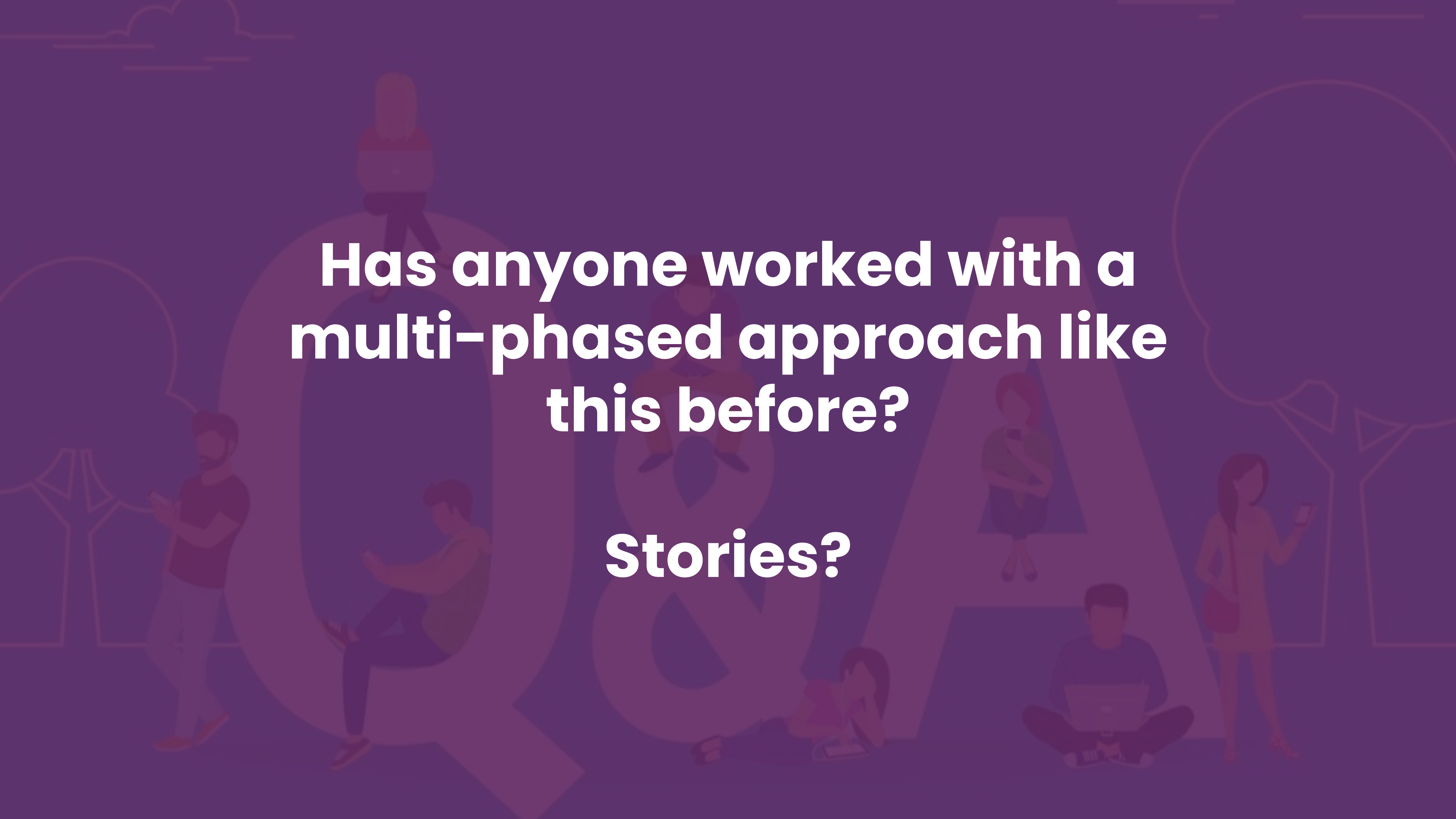
# Onion Diagram





# Phased Approach





**Has anyone worked with a  
multi-phased approach like  
this before?**

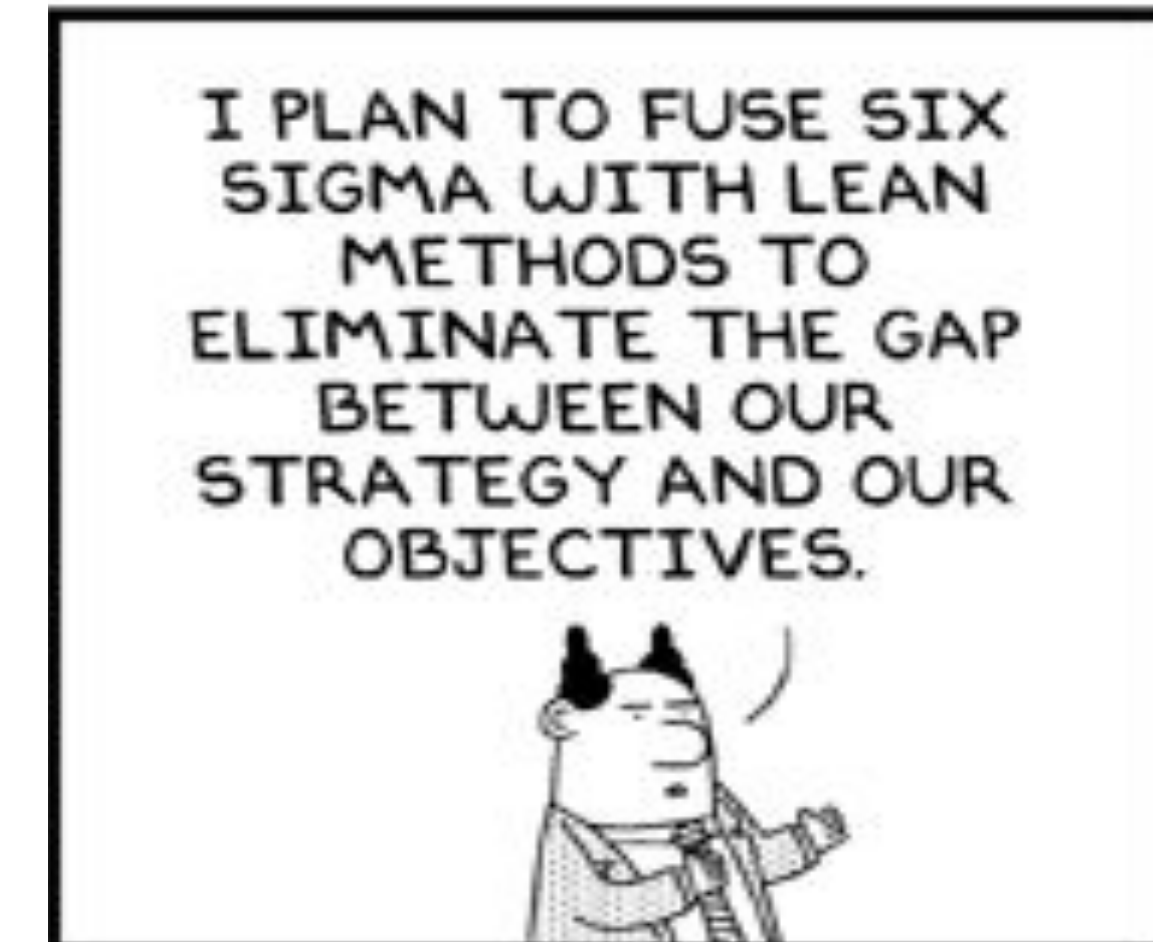
**Stories?**

# Avoiding Burnout



# Cadence and Ceremonies

- **Frequency and Saturation**
- **Sprinting**
  - **Scrubbing, Estimation, Placement**
  - **Standups**
  - **Demos**
  - **Retrospective**
- **Focus on Next**

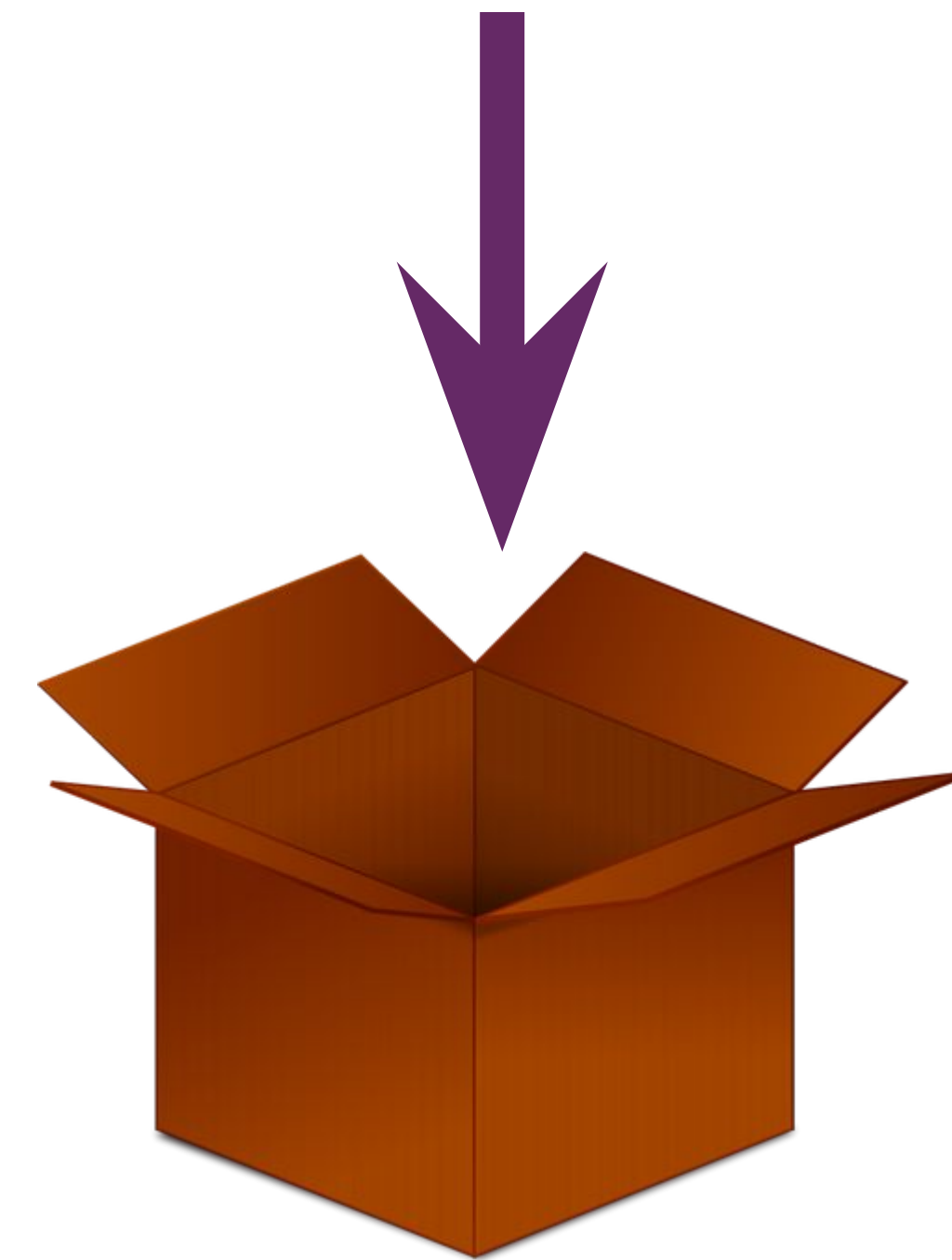
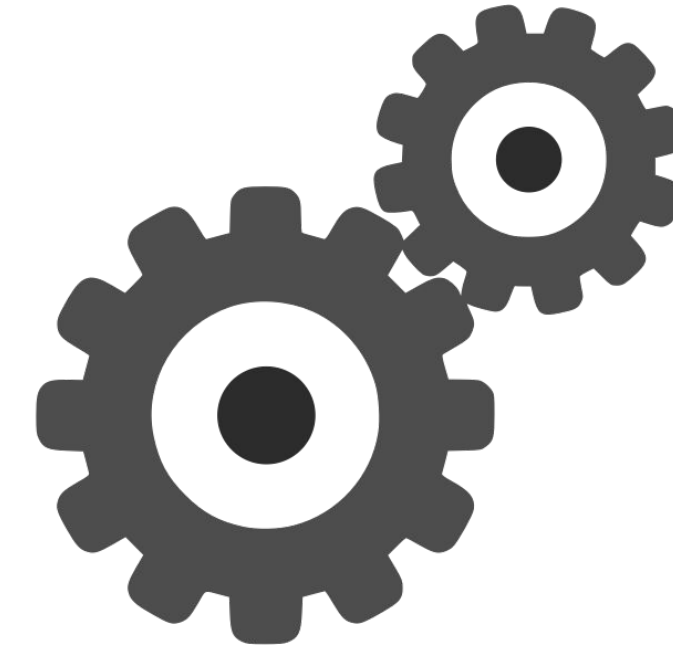


The background features a dark purple color with faint, light-colored illustrations. Large, stylized letters 'Q', 'A', and '&' are scattered across the scene. Various human figures are depicted in different poses, some sitting on the letters, some standing, and some using mobile devices like smartphones and laptops. The overall theme is digital communication and connectivity.

**What does your  
communication plan look like?**

# Getting in the Flow

- **Time Management**
- **Project Organization**
- **Browser Tab Organization**
- **Integrations**
- **Status Automation**
- **Respond or Remind**





The background features a purple gradient with faint white line-art illustrations of people using various devices. A large, stylized letter 'Q' is on the left, a large 'A' is on the right, and an ampersand '&' is in the center. People are depicted sitting on these letters, using laptops, smartphones, and tablets. The overall theme is digital technology and user experience.

**Other tips/tools?**



**PLEASE PROVIDE YOUR  
FEEDBACK!**

[mid.camp/8539](https://mid.camp/8539)



# CONTRIBUTION DAY

## Friday 10am to 4pm

You don't have to know code to give back!

New Contributor training at 9 am  
with **Matthew Radcliffe** of Kosada

**THANK YOU!**