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CTRL+CLICK CAST #13 Project Management for CMSS with Eliza Wee

[Music]

Lea Alcantara: You are listening to CTRL+CLICK CAST. We inspect the web for you! Today we're talking about project management for CMS builds with special guest, Eliza Wee. I'm your host, Lea Alcantara, and I'm joined by my fab co-host:

Emily Lewis: Emily Lewis.

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Emily Lewis: CTRL+CLICK would also like to thank [Pixel & Tonic](#) for being our major sponsor of the year. [Music ends] Hi Lea, how are you doing?

Lea Alcantara: Pretty good. I've been binge watching *House of Cards* this weekend.

Emily Lewis: Oh, I saw the very first episode of it, and I was like, "Eew, things are a little too dark for me." [Laughs]

Lea Alcantara: It's pretty dark.

Emily Lewis: [Laughs]

Lea Alcantara: Yeah.

Emily Lewis: You like *Breaking Bad*. I can't handle dark. I like happy, happy TV. [Laughs]

Lea Alcantara: Yeah, I know. This one would probably make you very, very distrustful of the government. [Laughs]



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Emily Lewis: Oh, I am. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: I grew up in the DC area. I think it's bred in me.

Lea Alcantara: Yeah, yeah. I mean, considering that it is based in Washington, that would probably be very traumatic. [Laughs]

Emily Lewis: So if you've been binge watching on Netflix, have you caught any of the Olympics?

Lea Alcantara: No, no, not really.

Emily Lewis: Really?

Lea Alcantara: No.

Emily Lewis: Oh my God. [Laughs]

Lea Alcantara: It's just...

Emily Lewis: I'm shocked. [Laughs]

Lea Alcantara: For this year, I haven't really been interested in the Olympics. I don't know, like I just feel like there's no, I don't know. I just don't feel interested, I guess.

Emily Lewis: Hmm, well, I've been watching, not like binge watching, but definitely catching a few hours here and there, and I guess it was yesterday or maybe it was Saturday, I saw the snowboard cross which I didn't even know was an event, but it's like...

Lea Alcantara: Snowboard cross?

Emily Lewis: Yeah, it's like motocross, but with people on snowboards.



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Lea Alcantara: Wow!

Emily Lewis: So they're going over these hills and they're catching air, and it was incredible. It was awesome.

Lea Alcantara: Wow!

Emily Lewis: And I also fell in love with the biathlon, which seems like this sort of – I don't know – it's like watching a marathon, I suppose. Like watching it, you kind of have to start appreciating what it's taking the athletes to do it because it's not really exciting, but like when they have to shoot, they have to literally control their breathing. I mean, they have to... They've just gone cross-country skiing and they're trying to catch their breath, and then they have to shoot, and you can see how their body just pauses. It's awesome. It's really cool. So I've been very excited about the Olympics.

[Laughs]

Lea Alcantara: [Laughs] I mean, because it's in Sochi, do you have to watch it super, super early in the morning or something?

Emily Lewis: Oh no, NBC does the broadcasting, and I think they've got online streaming stuff, but I would just catch it when they show it on the television.

Lea Alcantara: Okay.

Emily Lewis: And I avoid the announcements of who won what.

Lea Alcantara: Oh...

Emily Lewis: Because they announce who...

Lea Alcantara: Spoiler alert. [Laughs]



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Emily Lewis: Yeah, they totally do that. I remember a couple of years ago they tried to be like, “If you don’t want to know what the medal count is, mute your television right now.”

Lea Alcantara: [Laughs]

Emily Lewis: But let go of that this year, which I’m glad.

Lea Alcantara: That’s weird.

Emily Lewis: It was annoying. All right, well, we’ve got a lot of news to get to before we talk to Eliza, so let’s get started with some news in our world.

We want to let our listeners know that CTRL+CLICK is now sponsoring the weekly EE Help Chat with Arcustech every Wednesday at 3:30 p.m. Central. Either me or Lea, and sometimes both of us, will be hanging out in the chat room to answer your questions, and your questions will have to be about ExpressionEngine. Bring your questions about web design, dev, hosting, even branding and identity. Or just come hang out with us. Tune into our [Twitter feed](#) to get the link to the chat.

Lea Alcantara: Sounds good, and in other news, CTRL+CLICK CAST has also been nominated for the [2014 .Net Awards for Podcast of the Year!](#) [Laughs]

Emily Lewis: Wooo! [Laughs]

Lea Alcantara: We’re very humbled, thrilled and thankful that our hard work is being recognized, so if you love our podcast and find the content we provide useful and interesting and fun, we’d really appreciate your vote. We’ll have the link in the show notes.

Emily Lewis: I’m very proud of us. [Laughs]

Lea Alcantara: Yes. Woo! Go us! [Laughs]

Emily Lewis: I know because we’ve been working very hard for three years, so it feels very good.



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Lea Alcantara: Yes.

Emily Lewis: And thanks to everyone who nominated us in the first place to get on that short list.

Lea Alcantara: Absolutely.

Emily Lewis: All right, let's switch to the news in the world of content management systems.

Lea Alcantara: Yeah. So EllisLab has been blogging up a storm lately to amp up the upcoming 2.8 release of EE, so if you're a developer, the developer preview is now out, and if you're not a part of it, you need to email Wes Baker and include your publicly available commercial add-on link for them to review. So we'll have a link to that announcement in the show notes.

But what's more interesting than that is that it looks like 2.8 is finally tapping into the memory caching capabilities of CodeIgniter natively.

Emily Lewis: Oh.

Lea Alcantara: Yes, so previously, this was only available through CE Cache, and on top of that, they also talk about improving security even more for 2.8. So it sounds like a really exciting, upcoming release. We will have all the links regarding these announcements in the show notes.

And in both Craft and EE news, there is an upcoming LA ExpressionEngine Meetup with our previous guest, Ben Parizek, presenting a topic called *Refine or Reboot, Pushing the Limits of EE and When to Consider Craft*. So that's a kind of an interesting topic.

Emily Lewis: [Agrees]

Lea Alcantara: That's March 19 so there's still awhile to go, but if you're in the LA area, you should add it to your calendar. The link will be in the show notes.



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Emily Lewis: In the last episode, we talked about a tweet from Statamic showing a pic of a set of cards. Well, it looks to be a promo contest for the recently released Statamic 1.7. To enter you need to do something creative with their logo and/or branding or the word “Mouthnasium” and tweet your entry with #CampfireContest Or if you’re not a Twitterer, email gentlemen@statamic.com. The link and details will be in our show notes. Finally, if we overlooked news about a CMS you favor or are interested in, let us know and we’ll get in on our radar for future episodes.

So today we’re talking about project management for CMS projects with Eliza Wee! Eliza has over 15 years experience in the industry and runs her own company [Dogmo Studios](#), which specializes in design, front-end and CMS services. A designer and developer by *trade*, Eliza has become a project manager by *requirement*, serving as the de facto PM for many of Dogmo’s client projects.

Welcome to the show, Eliza! Thank you for joining us!

Eliza Wee: Hey guys, thank you so much. It’s nice to be here.

Lea Alcantara: Awesome. So Eliza, can you tell our listeners a bit more about yourself?

Eliza Wee: Oh sure. I live in Oakland, California. Sunny, sunny Oakland. Sorry, anyone on the East Coast.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: I live with myself. I live with two insane dogs that I love very much, and I do a lot of extracurriculars. But I think probably the formative stuff is that I quit piano when I was very young and got put it into oil painting by my parents, luckily for me. So I ended up becoming instead of a doctor or an English major as my parents had hoped, an art major with a lot of concentration in geology.



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Emily Lewis: [Laughs]

Lea Alcantara: Oh, interesting.

Eliza Wee: So believe it or not, it has led to my design career. It's been a windy path.

Emily Lewis: It's the same for me. My background is in psychology.

Eliza Wee: Oh.

Emily Lewis: And it's been a very windy path to get me where I am today, but it's interesting how those early choices, even when we're kids, lead to our interest later in life...

Eliza Wee: Yeah. Yeah, you never know.

Emily Lewis: Yeah, exactly.

Eliza Wee: Yeah.

Emily Lewis: So you started out, well, as you mentioned, you have education in art, but you started out as a designer for web and print, and then moved into more front-end work?

Eliza Wee: Yeah, I'm kind of odd bird in that I started in web first.

Emily Lewis: Oh wow!

Eliza Wee: Yeah, I started doing web design a 100 years ago, it feels like.

Emily Lewis: [Laughs]

Eliza Wee: And basically, art leads to a really exciting career in retail and food service.

Emily Lewis: [Laughs]



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Eliza Wee: Which was what I was doing, and so I was working at Kinkos. The short story is I ended up in the computer side, and I met people who were looking for designers and got hired, and so I ended up in a mar-com team for a fiber optics firm in Berkeley, and from there I ended up doing their web stuff and then ended up becoming a web designer, and the rest is history, I guess.

Emily Lewis: [Laughs] Now, when we were emailing back and forth about this episode, you mentioned that you've become the de facto project manager for a lot of the CMS projects you've worked on, and in fact, the reason I reached out to you in the first place is that you and I worked on a project together, and that was kind of the role you fell into as well for that one. Now, do you like this sort of new direction in your career? Do you still do as much front-end? Are you basically doing two jobs at once, or are you doing mostly project management these days?

Eliza Wee: I think the sort of beauty and irony of my job is that I really am happy whenever I find stuff that pays.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: So I work for myself, so I'm thrilled when I can find a need and fill it. Again, it's been a little bit random. I do a lot of design. I'm doing more print design ironically of recent, but I do a fair amount of project management, especially for the team that I was working with when I worked with you, Emily.

Emily Lewis: [Agrees]

Eliza Wee: Simply because that's where their greatest need is. They have really good content people, but they don't understand necessarily the web and so it becomes a really great place to interface with clients. So that it's usually been clients who have pretty extensive web needs, as does



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everybody these days, so it helps to have somebody who can think through the whole picture. My personal preference is to be as involved as possible throughout the entire arc of the project. It gives me a better understanding of how things can be done better, especially given usually there are also budgets and time constraints. So I really enjoy it.

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Lea Alcantara: So I'm curious, if this was something that you sort of pursued or if you fell into it? When you started a project, were you sought out, or did you put yourself forward as "I'm going to be a project manager," or were you initially hired for something else and then you took on that role?

Eliza Wee: [Laughs] I think that the more you know, the more I think, "My God, I'm not expert."

Emily Lewis: [Laughs]

Eliza Wee: So I think most of my life I've fallen into very fortunately finding what I love to do. I'm kind of nosy, I like to know... I'm a little bit of a control freak, so I like to know how everything works. I would say that more I've fallen into it.

Lea Alcantara: [Agrees]

Eliza Wee: So for instance, there's one client that Emily and I worked together with, they just needed the web stuff and they had a really print mentality, and they still do. They're evolving and they've come a huge way a long way since then. So they originally hired me thinking, "We just need a web person." And I think that a lot of times people don't understand the complexity of the web and, especially if you're working with a CMS, how there are different parts, and as you mentioned design, front end, and then there's a whole kit and kaboodle for the CMS itself. So it became kind of a natural application for those projects.

Lea Alcantara: [Agrees]



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Eliza Wee: For other projects when I'm not working with that client in particular, I will wear two hats. Often I'll do the design as well as the project management. Sometimes I will also do the front end, depending on what's needed.

Lea Alcantara: [Agrees]

Eliza Wee: I get bored easily so I really appreciate the diversity of the work.

Emily Lewis: Now, do you feel that it's necessary to be a CMS dev or specialize in a given CMS to effectively do the project management for the build?

Eliza Wee: I think the best-case scenario is to hire people smarter than myself who can handle those pieces.

Emily Lewis: [Agrees]

Eliza Wee: And the really interesting thing that has happened for me is I've been able to hone in more on the places where I'm strongest. I'm not terribly strong on the back end, so if I can hire somebody to do the CMS, that's where I'm happiest, but it really requires somebody who's a good communicator, so the really smart people that I've worked with like Emily are really good both at the communication side and the tech side.

Emily Lewis: [Laughs]

Eliza Wee: Which I really appreciate because I can trust them to tell me what the limitations are, what we can and can't do, because almost always nothing is impossible, it just will take more time or money. So I'm not, for instance, very well versed in ExpressionEngine... that was my first project using ExpressionEngine, which is why we scrambled to hire Emily. But I feel like with the right dev in place, I don't have to know the ins and outs.



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Emily Lewis: Now, you mentioned time and budget, to me that's part of what a project manager has to oversee. What do you think of, what does project management mean to you when it comes to a project specifically one for a content management system? How much of it is keeping the budget and timeline? How much is it people management? How much is it task management? And is it different from project management on something that doesn't involve a CMS?

Eliza Wee: I'm going to start backwards. I think it is not different from other project management skills. I've been talking to a few people who do project management a 100% of the time, and the biggest complaint I get is that you don't carry a very big stick when you're the project manager.

Lea Alcantara: [Agrees]

Emily Lewis: [Agrees]

Eliza Wee: There's always somebody who's going to have more weight to throw around so a lot of what I do in project management is setting expectations. So I'm Chicken Little, "The sky is going to fall. Okay, the sky is really going to fall. Okay, you guys, the sky is falling all around us."

So I feel like the biggest thing I do is people stuff. So I don't know if it's people versus tasks, but it's managing the expectations of the people, and if there are people in between me and the final decision makers, it's making sure that I document, "Okay, I've warned you 15 times that the sky is falling. So when we the 20th time, there will be implications, whether it's the deadline or the budget, something has to give. You can have everything, you just can't have it all at the same time for the same price." So that's been the biggest challenge.

I think CMSs are really cool. They add a whole lot of complexity, and I don't think clients are always prepared for the complexity, so I started making sure that that's something that gets spoken about very early. In some other of my projects, we'll build a great site, but they'll never use the CMS. In



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which case, it's added complexity that they have to pay for in the development work, and so if we can sort of suggest to them, "Maybe you don't want to pay for that." I hate to do that because I want everyone to be on the CMS, but I think as a good project manager and client advocate, I have to sort of put all the cards on the table so they can make the best decision.

Emily Lewis: Well, that's interesting, Eliza, because, and again I'm referencing the project we worked on, you mentioned that a big part of your role is client advocacy. Now, in that project, we had a lot of different parties. Your company was involved. My company was involved. There was like a third-party design agency, and you were dealing with all of us. Was client advocacy your number one priority or was it working with the design agency or me? What was it that was the number one thing, even though maybe the client hadn't directly hired you as a project manager?

Eliza Wee: Yeah, that's a great example. So in that project in particular, I was hired by – I don't know how to describe them exactly just because they're a little bit out of the box, but they are succinctly an advertising and branding type of firm based in San Francisco. They hired me. I quickly went and hired a dev person that I normally work with, and then we hired Emily to do the CMS, the EE component. So it was a really interesting conflict at times because my client technically is the design agency, but the overall project, and I think this is important for all levels of design no matter what hat you wear, is keeping the end client happy.

Lea Alcantara: [Agrees]

Emily Lewis: [Agrees]

Eliza Wee: And then above and beyond that is their users. So I think the way I tried to keep my thoughts clear, which is really hard was that the end user was the most important voice, so whoever their stakeholders are. So it was a little bit challenging in that I didn't have control of figuring out and



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setting up those expectations from the get-go. So we didn't have really clear outlines of who the stakeholders were. Well, we have some outlines on that, but not as much on the end user, so exactly what our end user looked like. There were sort of anecdotal references to that, but I didn't feel like that was as mapped out, so as much as I could, I tried to keep that in mind. The secondary goal then is to keep the top level client happy, but really I could only affect the client who hired me, the design agency.

Emily Lewis: [Agrees]

Eliza Wee: So at some times, I just have to let stuff go, which is very challenging, and so I would say, "This isn't a good idea." And Emily, we experienced a lot of back and forth trying to get a very complex design to work.

Emily Lewis: [Agrees]

Eliza Wee: And Emily really went out of her way and made a really beautiful, elegant EE system that worked with a very, very complex front end, and I think it still is quite challenging.

Emily Lewis: [Agrees]

Eliza Wee: So I think in the end, I'm not doing any favors if I don't think about the client who hired my client, and I try to keep that in mind as much as possible. And I do a lot of the Chicken Little dance warning my client, "You really need to tell them and you really need to document because we're headed for a cliff." If that's not conveyed in a manner that I want, it's out of my control. So it was an interesting challenge overall.

Lea Alcantara: So I'm curious, I'd like to talk a little bit more about specifics, about what you are managing. Is there any specific "must manage" elements or phases of the project where you're talking about the complexity? What are the complex parts?



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Eliza Wee: [Laughs] A couple of things. One big red flag that has gotten better with time is getting to see the designs earlier and trying to push back. And one of the things that I'm pushing for and I have yet to be successful with an outside designer is that I really want people to build mobile first, and I make every argument I can under the book, and I have yet to pitch that successfully, whether that's to this design agency in particular or to my own clients. Because people perceived mobile as this extra step that will cost them more money without realizing it's really a good initial step for all of the other designs. So that's a huge red flag that I'm still working on addressing, and a huge place of complexity that I think needs to change in all of my workflows.

Another red flag is, for me, when I can't access the client at all. So I always try to get an in, and I usually frame it as I need a production level or some server back-end person, whoever they have who's usually really low on the totem pole that I can access or try to get access to, just because they can often answer really real questions about who's going to be using the CMS, what the real needs are, who the different departments and players are.

And then I try to get a sense of the bigger picture so the top level people who might come in at the very last minute and throw their weight around. So a lot of times there's a really, really high up person who's too busy to be involved. So I do my best to try to encourage that person to be involved at least in the beginning so that they are present and then I sort of naturally follow the whole agile workflow rather than the waterfall. So I prefer to keep everybody in the loop, which is a little annoying. I'm definitely one of those evil people that over CCs.

Emily Lewis: [Laughs]

Eliza Wee: But I would rather everyone know than not. So I think if I were to be succinct, the biggest thing is communication and making sure that I'm communicating with as many of the important



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players as possible which usually cuts across hierarchy quite drastically, and I don't always have access to that which is hard.

Emily Lewis: Now, I imagine that scope creep, and as you already mentioned, managing expectations, those are when you have to do your little Chicken Little dance. [Laughs]

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Eliza Wee: Yeah.

Emily Lewis: But how do you take that approach in terms of dealing with these things? You've mentioned that you have to maybe alert them 20 times. In that process of alerting them, how do you phrase things? Do you try and do something to escalate it to someone else? And not only, for example, with scope creep, it's one of those things that you think comes from the client most of the time, but sometimes it can also come from the developers and the designers themselves, and so how do you talk something like scope creep and that red flag with not the client, but the other developers involved?

Eliza Wee: That's a good question. So yes, scope creep is a huge beast. So I think one of the things that I do is above and beyond communicating, I try to put anything super important in writing. So at least in email, and I try to include as many people as possible without being obnoxious.

So one of the things that will happen is I try to make sure that there is a point person on the internal team that is my sort of go-to person that I can add to these emails, so that at least there's somebody on the inside that has been informed if possible. I don't always have that, whether it's my client or not.

So I had another project where there were decision makers who were high up who didn't want to be bothered, and so it was hard politically, I think, to include them on emails, but they really need to be



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told. So that sort of thing is challenging. Also, sometimes you'll work on a project long enough that teams change, which is really a nightmare.

Internally, I think, I generally love back-end developer and server folks. They're really easy about understanding, "Okay, this is going to blow up in our faces." I think they have a good sense of that so I haven't had much of a problem with that. Emily, you can tell me if I've missed something.

Emily Lewis: Well, no. I was also thinking of there would be a requirement that was documented, either whether it was reflected in the design or in some sort of planning document, and I'm sure as you learned with EE, there would be two, three different ways of approaching it, and so I would come to you as, "Well, here are the three ways I would suggest."

Eliza Wee: Yeah.

Emily Lewis: And it would be you who would guide me in what direction we wanted to go on, and I was just curious like what were you referencing to help guide me in that decision.

Eliza Wee: Oh, now, that's a good point, and that brings up documentation. So I think what you're asking and what we're talking about here is we would have things that were documented and then things would change, and we'd have to build, and the build would inadvertently change the best choice that you've made.

So what I would do to the best of my ability is just go back to my client and say, "Okay, this change will add this much time as far as I can tell versus this change." And that actually is a really useful conversation to have because I think people will often ask, and they should ask, they should ask for everything they want, and it's our job to tell them, "Well, you can have it, but that actually is going to be horrible for us to implement."

Emily Lewis: [Laughs]



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Eliza Wee: “And it’s going to be a big headache for you down the line when you’re trying to update content because of this.” So I think it’s really important to tell them because then they can say, “Well, but my CEO is really crazy about this one thing so we have to do it.” And then you do it, because if there’s an important enough stakeholder frankly, then you just have to do it.

But yeah, so that’s a good example, and I tried to do that stuff in writing as much as possible. In our emails back and forth, Emily, you have pointed out some of the more cumbersome documentation we’ve implemented. I tried originally to do really, really comprehensive documentation, thinking that that would protect us a little bit and provide the client with really good information in the future, but I don’t know that that always gets read.

Lea Alcantara: [Agrees]

Emily Lewis: [Agrees]

Eliza Wee: So it’s mostly emails.

Lea Alcantara: Well, that makes me ask how do you manage all of this communication? Like what tools do you use for documenting and project management?

Eliza Wee: [Laughs] Well, I would like to put out to your listeners, somebody needs to build a better suite of tools.

Lea Alcantara: [Laughs]

Eliza Wee: Because I use Basecamp on my projects with Emily and with a number of other clients, and I love it, but I do feel like it has its drawbacks. I have also used Asana, and I actually love Asana quite a lot for smaller projects.

Emily Lewis: And that’s that task management thing, right?



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Eliza Wee: Yeah.

Emily Lewis: Yeah.

Eliza Wee: But we've been using it as a sort of informal track for bugs and tickets and stuff.

Emily Lewis: Oh, okay.

Eliza Wee: Just the to-do list, and it's really lightweight, and so I feel like Basecamp adds stuff that I don't want.

Emily Lewis: [Agrees]

Eliza Wee: But it has great controls, especially when sharing with clients, and I really hate this file sharing structure in Basecamp such as it is. So there are things in Basecamp that I wish were different. Basecamp is probably the most comprehensive tool I've used. Asana is a nice, lightweight one if I'm working with a smaller team, and it's not as heavy duty as Trac, which I've also used if you have a track system that's built in with your wiki, that's awesome like if you're working with developers, and oh, on Google Docs. So I've misuse Google Docs quite a bit.

Emily Lewis: [Laughs]

Eliza Wee: I tried to make it into the system that it's not. I feel like if someone could tie in Google Docs to a decent system, we'd have most of the pieces in place because there's calendar, there's good file sharing, there's good permissions, but I haven't seen anything yet.

Lea Alcantara: So before we go on, we'd like to take a moment again to thank our sponsor, [Squarespace](#), who make it really easy to get a website up and running. We know there are a lot of devs listening to the show, and if you're looking for a job in New York, they're hiring engineers. We'll have a link in the show notes. And if you're a developer who wonders whether [Squarespace](#) can work



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for your projects, they do have a developer platform at developers.squarespace.com. If you want to try the service out, they are giving our listeners a free trial and 10% off their first purchase. Just go to squarespace.com/click and use offer code CLICK.

Now, back to the topic at hand...

Emily Lewis: So Eliza, with these tools you've mentioned, are these ones you're using just internally with your own team or if you're hired by an agency, or do you loop the client in on these?

Eliza Wee: So this is where Basecamp shines. Basecamp is the only tool that I found that has a good set of settings so that I could have a track list for an internal team, as well as a client viewable track list.

Lea Alcantara: [Agrees]

Eliza Wee: So I believe with the project we worked on, I can't remember it now, we used it or I certainly have used it in recent projects where the client has access to the project in Basecamp.

Emily Lewis: [Agrees]

Eliza Wee: With Google Docs, and actually also I forgot to mention Dropbox, I do share that with clients, but Asana, it's almost always just... no, actually, I take that back. I have shared this with clients in Asana, but typically those are very small projects and it's really a less formal team usually. So I guess the short answer is yes, I've used them with clients with varying degrees of success.

Emily Lewis: Yeah, I'm still struggling to get that client we worked together on to Basecamp regularly. [Laughs]

Eliza Wee: Oh yeah.



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Emily Lewis: One of the things I like about Basecamp, and I guess this would fall under project management, I just feel generally it's project communication, is that I don't always keep all my emails archived. The client doesn't always, and with Basecamp, if we keep all of our communications in Basecamp, then it's searchable and I can find it later.

Eliza Wee: [Agrees]

Emily Lewis: What Lea and I have been doing lately in Basecamp is we only use it for the messaging with a client. Everything else is kind of internal. Oh, and then obviously like file sharing for them to do like review comps and stuff. But I've always been in this situation where something will come up and I'm like, "Oh, we discussed that three months ago. I can't find the emails. I can't find the chat." And if it wasn't in Basecamp, it's kind of gone.

Eliza Wee: Yeah, I agree, and I do love that about Basecamp, and I do think it is a huge training curve, and I don't know if this works for you, Emily, but I try very hard, if I'm using Basecamp, to force people to respond.

Emily Lewis: [Laughs]

Eliza Wee: So if they email me outside of Basecamp, I will copy and paste it into my file.

Lea Alcantara: [Agrees]

Emily Lewis: I do the exact same thing.

Lea Alcantara: Yeah.

Emily Lewis: I'll say, "As you stated in email." [Laughs]

Lea Alcantara: [Laughs]

Eliza Wee: Yes, I do that. "On this day at this time," and then just include everybody.



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Emily Lewis: Yeah, it's one of my passive-aggressive project management techniques. My other one is the kind of over CCing people when someone is not responding.

Eliza Wee: Yeah.

Emily Lewis: Copying a bunch of people and be like, "I haven't heard from you yet. Could you let me know something?" [Laughs]

Eliza Wee: Yeah. I don't think it's bad. I think that's a very polite way of being politic about it.

Emily Lewis: [Laughs]

Eliza Wee: This is just like, "Hey, I don't know if my email is down, but I haven't heard from you."

Emily Lewis: [Laughs]

Eliza Wee: "And I'm going to CC a couple people in case your email is down. No offense." You know what, it is kind of a hard line to walk.

Emily Lewis: It is, and I think this brings up another question I hadn't really planned to ask, but it occurs to me, I ask you if you needed to be a CMS dev to do project management for a CMS, and you said, "No, not really." But I'm curious, do you have to be a really calm and kind and not stressed-out person?

Eliza Wee: [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: Because you always seemed really...

Eliza Wee: No.

Emily Lewis: You had it together, even though I was like freaking out.



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Eliza Wee: You are.

Emily Lewis: [Laughs]

Eliza Wee: Wow, you totally fell for it!

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: I am the most plastic, most anxious, most caffeinated, meanest person that I know.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: Which just might mean that my friends are all really nice, but no, I benefit greatly from the world of email and the written word because it gives you pause.

Emily Lewis: [Agrees]

Eliza Wee: And I think that I have learned a ton working for myself, which is fantastic. And one of those things is that this is a client services profession. So I will often swear offline to my friends, but I try not to have that come through, and it's really hard because some days you're just like, "Oh my God, are you kidding me? You are being stupid." And you just want to tell them, "You're being stupid. It is good for you to know that."

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Emily Lewis: [Laughs]

Eliza Wee: But I do my best to filter that out as much as possible, and I think that that is more or less a professional choice that I need to make if I want to keep the work coming in since clients are who



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pay my bills. So I try to keep that in mind at every point. The other thing that I try to keep in mind, which is very challenging sometimes when projects go awry, is that the client really knows best. It's their project.

Lea Alcantara: [Agrees]

Eliza Wee: It's their – whatever they're selling – their widgets. So as much as I think I know, I really know a small piece, and even like in the last project we worked on, I think we had a lot of challenges because the design was so challenging, which I feel like I beat my head into the wall several times on that project.

But the other side of it is that those guys are such amazing content and communicators that I've learned so much from them about that. So I just try to balance my frustration with, "Okay, there is stuff going on that these people are really good at that I don't know, and I need to not just write them off as being stupid."

Emily Lewis: Now, I'm curious, when you're dealing with, I guess it really depends on whether it's your client has directly hired you or you're working as a sub for someone else, but do you list project management as a separate line item in your proposal, whether it's to the client or to the agency or it sort of factored into an overall cost?

Eliza Wee: Well, this has been evolving too. I used to not list it at all, and then as I did more and more of it, I've started making it in my estimates a line item. And the interesting thing to notice is in some projects, the project management is much larger than I ever anticipated.

Emily Lewis: [Agrees]

Eliza Wee: And this is for print too. This isn't web specific. I'll go into a project and not realize how much time is going to be spent on meetings or like just figuring stuff out because the teams are so



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complex. So I feel like it's still evolving. I'm learning to allot more time for it. The really hard thing is clients don't understand what they're paying for.

Emily Lewis: [Agrees]

Eliza Wee: So this is a bad example, but if you're working on a postcard, they're like, "Just crank it out. I don't understand why it's taking so long." And with any design projects, even as something as simple as a postcard, you have to get from them what it is that they want, so you can make the right solution, blah, blah, blah. So there's a certain amount of getting into the client's head. Maybe being a shrink would help...

Emily Lewis: [Laughs]

Eliza Wee: But so I feel like I haven't figured that out, like I don't know how to do it to walk that line of "I don't want to bill you for just being in meetings, but I have to cover my hours somehow."

Emily Lewis: [Agrees]

Eliza Wee: So it gets a little bit creative.

Emily Lewis: Yeah. It's one of those things I think, Lea, you would agree, where we're also struggling a bit with to find the right balance.

Lea Alcantara: Yeah. Like right now I think what we ended up doing is we looked at our past projects, and because Emily and I track our time really diligently and specifically over like meetings and calls and stuff like that and we isolated how much time it averaged out per project, and so when we're estimating for a new project, we just kind of add that average to the estimate. Not necessarily as a line item, I don't think. I think we just add it as part of like, "Okay, we're going to anticipate that we need to do this much project management based on the average of the past projects." And then



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what we're trying to do is that we're trying to maybe set a limit to that and that to tell clients that if it goes over this much, then we're going to start billing you hourly.

Eliza Wee: Do you actually tell the client, "Okay, we anticipate this project will take 20 hours of management."? And then do you actually tell them that? Or do you wrap it into another bucket?

Emily Lewis: So far we've just sort of wrapped it into a total, but we're just now starting to think about separating it in its own line item in the project proposal. And I think our average that we've come out with is that project management takes about 7% of the total hours of the project.

Eliza Wee: [Agrees]

Emily Lewis: And so when we're doing a proposal, we figure out what the cost is going to be. We do the math of 7% and we put that in, and then we're anticipating that when we next do a kickoff where we've done this line item approach, because this is just an idea, we haven't done it yet...

Lea Alcantara: [Agrees]

Emily Lewis: That during kickoff, we'll say, "As your signed document indicates you get 7% where you get X number of hours of project management. We'll keep you posted about where that's being spent and then it goes to hourly."

Eliza Wee: Oh, no. I love that actually. I would actually probably up it with a 10% just to be safe, but it would be kind of an interesting thing to go into a project and say, "This is what I believe this project will take, and typically it takes 5-10% of my time to manage the project, so this is my anticipation of those additional hours."

Lea Alcantara: [Agrees]

Eliza Wee: But it is hard, because clients start freaking out when you're like...



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Emily Lewis: [Agrees]

Eliza Wee: Because if it's a huge project, if it's a \$100 project, then you're talking... actually, that doesn't sound but like ten hours, but the clients will start complaining.

Emily Lewis: Yeah, and I'm certainly concerned about it, but I'm more concerned about the fact that in the past, I haven't been too good about paying attention to how much time I'm spending on project management.

Eliza Wee: Yeah.

Emily Lewis: And then when I looked at it, I was shocked at the amount of money I was losing.

Eliza Wee: Yeah.

Emily Lewis: And I think Dogmo, your company, is like this as well as, that we spend a lot of time getting to know our clients and making them feel that we're their partner, and that involves some hand holding. It involves a lot more calls than you might expect. It has nothing to do with whether they're tech savvy or not. It has to do with getting to understand their business and how their needs may evolve from the beginning of the project to the end.

Eliza Wee: No, this is great, and this isn't strictly project management, but this is a great sort of I don't know how to balance this piece. Because it is one of those things that comes up time and time again, and I don't want to rip clients off, and I want to be really transparent and I try to be very transparent in my billing. I'm probably more granular than I need to be. But at the same time it's almost easier to hide those numbers, and I'm not advocating for this, but it's almost easier just to put that call into the bucket of postcard or web development or design.

Emily Lewis: [Agrees]



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Eliza Wee: Because people are willing to pay for those things, but they don't understand the value of good project management, so I do have that challenge. And it's interesting, I was talking to somebody else about this who was talking about it who said to bill the way lawyers do, and lawyers often bill in 6-minute increments because it becomes a decimal point and they bill for everything.

Emily Lewis: [Agrees]

Eliza Wee: But for better or for worse, I don't think we have the perceived value that we can do that. The other place that I've tried to factor that in as much as possible, which is hard to do, is in the hourly rate. So I think I sometimes have shot myself in the foot by not including enough in the hourly rate, because there is that incidental time, because it's really important that you do all this work, but you can't charge like so much of your time is not billable.

Emily Lewis: [Agrees]

Eliza Wee: I think, Emily, what you're talking about. But we need to survive. So it's one of those things where people freak out about the hourly rate, but that's one of the costs associated with that again.

Emily Lewis: Yeah, it's definitely a challenge. It's a fine line of wanting to value yourself and value the work that you're doing, as well as respecting the client's perception of that value which may not be as educated as it should be. But I think that's the nature of our relatively new industry.

So I want to kind of focus a little bit on CMSs specifically as we close up. So what types of CMSs have you worked with in any capacity? And then which ones have you done the most project management with?

Eliza Wee: Sure, I basically have worked in Drupal, WordPress and now ExpressionEngine. ExpressionEngine, I've only worked in one project. I have to say, Emily, I do love it ... watching you



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work in it and seeing everything you could do with it and seeing how intuitive it is has made me a believer. I think that it's hard to sell ExpressionEngine and then Joomla, for instance, because there's a cost attached. So clients, and it's one of those things where you want to be like, "But this is the best solution for you. This is the best solution for you." But as a result, Drupal and WordPress are by far where I do most of my work.

Emily Lewis: [Agrees]

Eliza Wee: And then the way that I approach it is WordPress is typically much less expensive to develop for, so the smaller budgets tend to go for WordPress and even some of the larger budgets. So at this point, I would say most of my work is probably still in WordPress with a good chunk of it in Drupal.

Emily Lewis: Comparing WordPress and Drupal, and if you want, the EE project we worked on, is project management different for each of those CMSs? And I mean, I know you mentioned in the beginning, you don't have to be a CMS dev to do good project management...But I imagine that each CMS has its own nuances that you have to plan for on some level?

Eliza Wee: Yeah, and this is where I mean rely heavily on the dev. So there is different planning that happens. I mean, all of them, I believe, if done right work from content out, so you try to just drill down to the smallest piece of content and then there are templates that incorporate that content so it's not static pages. So I feel like there needs to be some mapping of content that happens early on, and some mapping of template types or something that is the same across the board.

They are slightly different, and one of the things about Drupal that's like EE from when I worked with Emily is that there is a myriad of ways to approach it, and I feel like with Drupal and EE, you have to have a better understanding of the CMS to really fully incorporate it. You do with WordPress as well,



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and I work with some really smart people who are doing really amazing things with WordPress and custom fields, but it's a little bit more flexible and a little easier to wing it with WordPress I think.

Emily Lewis: [Agrees]

Eliza Wee: So with Drupal, and I think if I were to do EE again, I think the documentation is a little bit more stringent on the dev side. I think it's good to have that if we can.

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Emily Lewis: Now, if you're in a position to recommend the CMS, like you're involved really early on, how do you choose the solution that will work for the client? I mean, assuming that you have full knowledge of the project and you know what solutions you're skilled with or your team is skilled with, does project management enter into that decision at all?

Eliza Wee: I think it does. I think one of the largest things is budget to be really honest.

Lea Alcantara: [Agrees]

Eliza Wee: I can often find developers who do WordPress for much less money than Drupal or I think even EE. There aren't many of you out there that do EE, which is good for you guys.

Emily Lewis: [Laughs]

Eliza Wee: To be honest, a lot of times it depends on what the client is... well, I go back and forth on this. I feel like WordPress can be quite annoying and not very intuitive and it's harder to change the interface, that sort of dashboard, unless you have a good dev, and fortunately I do, to try to make it a little less cumbersome. So it seems like there is more custom-ability, I don't know if that's the word, in Drupal and in EE, and I was really impressed with Emily the way that you were able to build out an interface in EE that tried to protect the client from themselves.



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Lea Alcantara: [Laughs]

Emily Lewis: [Laughs] Yeah.

Eliza Wee: Which I think you can do pretty easily or not easily, but Drupal is built for that a little bit more than WordPress I believe, but having worked with a couple of really skilled WordPress developers, I've been really impressed at what you can do and what things you can change, and at the end of the day, if they have a comfort level with one of the tools, even if I've used WordPress and I kind of hate it, I try to suggest that they don't change. So if they're already on Drupal, even a Drupal 8 is going to be a big change, like I'm trying to keep them on the same platform because I feel like if you're in a big institution, it's really hard for people to change.

Emily Lewis: [Agrees]

Eliza Wee: If there isn't sort of any historic institutional memory that we need to keep in mind, then I love it like I love having the conversations with people, and as much as I can, I try to get people to actually touch the back end, like set up a dev site and look. That would be the dream, it will be like, right, "Look, what do you like? Take a look at it."

Emily Lewis: Right. [Laughs]

Eliza Wee: But that can be hard because people don't have time. I don't know, I have to say, Emily, I was really impressed with EE, so like I do always try to mention it, but I think the budget, you see, comes into play with that.

Emily Lewis: Yeah, it is always a challenge. Whenever it comes down to recommending a CMS, I always have to check myself because no matter how much I value my clients, I always want to pick what I know I can do the best job with.

Eliza Wee: Right.



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Emily Lewis: Which may or may not probably be the best tool for the client. [Laughs]

Eliza Wee: Well, but at the end of the day, I feel like we are really lucky in that there are so many amazing tools out there and they just keep getting better.

Lea Alcantara: [Agrees]

Eliza Wee: And so if you're really good at it and if you can pull out of whatever CMS you're working in the best product for your client, I don't think it matters.

Emily Lewis: [Agrees]

Eliza Wee: And I don't know if that's sacrilegious to say because at the end of the day, you can build a really great site with any of these tools. And I have friends who are very, very good at WordPress and who do really incredible, really cool things with it. So even though in my mind WordPress is the least technical solution out of the three, like I will go with whatever my developer says at the end of the day, right?

Emily Lewis: [Agrees]

Eliza Wee: And so if the project is going one way or another and the developer has a strong feeling, I'd listen to that.

Emily Lewis: So moving forward, Eliza, do you think you're going to take on more project management or keep it the same what it is now?

Eliza Wee: [Laughs] You attribute too much control over that. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]



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Eliza Wee: I will do what comes. [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: I have been pleasantly surprised at how much I like people. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: When I started this, I thought, “Oh God, I love what I do because I sit behind a computer all day.” But I have to say with like running my own business, the project management and the sales component are so necessary.

Lea Alcantara: [Agrees]

Eliza Wee: So there are all these things that I used to hate, and now I’m like, “You know what, these are the things that make the project really juicy and interesting, right?”

Emily Lewis: [Agrees]

Eliza Wee: Like if you can get into someone’s head and understand why they need something, and the tough side is a lot of times it’s not need, so it feels like you don’t actually need a website redesign. What you need is content. So I feel like that’s the piece that I love about project management, it gets you to the nut of the problem, which I think all good design should do, right?

Lea Alcantara: [Agrees]

Emily Lewis: [Agrees]

Eliza Wee: And which is really hard sometimes because you really want to pitch a big, huge website redesign that’s going to keep you in the money for a few months or whatever. But a lot of times, that’s



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just somebody at the top who thinks that that's going to fix things, and really it's that they have some god-awful brand or some mis-targeting of their content or something that's more basic that they need to come back to. And I've had people who are like, "Let's do the website first and then the logo and then rebranding them." I'm like, "The website is really a component of your brand. It shouldn't be the thing that drives your brand."

Lea Alcantara: [Agrees]

Eliza Wee: So those pieces I really love, and I think the more holistically I can work, the happier I am so I think as a result, I always have to do project management. In the future when I'm really rich, I would love to hire a project manager.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Eliza Wee: Just like I would love to hire a sales team, but that's just like unicorns and rainbows.

Emily Lewis: [Laughs]

Lea Alcantara: And so before we let you go, Eliza, we like to let our listeners know our guest a little bit better, so we took a cue from Inside the Actors Studio and created a list of 10 Questions.

Eliza Wee: [Laughs]

Lea Alcantara: Are you ready?

Eliza Wee: I think so. I'll sit down.

Lea Alcantara: All right.

Emily Lewis: [Laughs]



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Lea Alcantara: So quickly, Mac OS or Windows?

Eliza Wee: Oh, Mac.

Emily Lewis: What is your favorite mobile app?

Eliza Wee: My favorite mobile app? Oh, this is terrible. I don't use apps a whole lot. I believe in HTML5, but I'm a Candy Crush addict, which I'm very ashamed of.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: Awesome, so what is your least favorite thing about social media?

Eliza Wee: The fact that I'm really heavily addicted to it.

Emily Lewis: [Laughs] What profession other than yours would you like to attempt?

Eliza Wee: Oh God, there are so many. I wish I was a marine biologist.

Lea Alcantara: That's cool.

Eliza Wee: Kind of.

Lea Alcantara: What profession would you not like to do?

Eliza Wee: Oh, there's a lot, and I've done a lot of them. I am glad that I don't know how to clean the Fryolator, and I am glad that I don't have to do anything that involves bodily fluids. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs] Who is the web professional you admire the most?



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Eliza Wee: There's a lot. There are a lot of those famous web people that I follow on Twitter. I'm going to say it even though he's kind of a jerk, [laughs] Mike Monteiro.

Lea Alcantara: Okay.

Emily Lewis: [Laughs]

Eliza Wee: Yeah, he's got a persona and stuff, but he has written some really great stuff, and is consistently amusing to follow on Twitter.

Lea Alcantara: So what music do you like to work or code to?

Eliza Wee: Oh, I'm kind of an obsessive person, so I go through phases. I was on a Janelle Monae pick for all of last year, I think.

Lea Alcantara: {Agrees}

Emily Lewis: [Agrees]

Eliza Wee: And now because of De La Soul, they just released their entire discography online on the 14th, I can't stop listening to them.

Emily Lewis: [Laughs] Yeah, I downloaded those myself.

Eliza Wee: I know. [Laughs]

Emily Lewis: What's your secret talent?

Eliza Wee: My secret talent, oh geez. I can eat an immense quantity of food.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]



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Eliza Wee: And to go along with that, I think that if you set something in front of me, I will demolish it, whether it's food or whatever, to my unhealth.

Lea Alcantara: [Laughs]

Emily Lewis: [Laughs]

Lea Alcantara: What's the most recent book you've read?

Eliza Wee: Well, I just finished the *Divergent* series.

Emily Lewis: [Agrees]

Eliza Wee: Which is coming out in a movie form soon I think, and I am working on a couple of other books, but they're going slowly.

Emily Lewis: And lastly, *Star Wars* or *Star Trek*

Eliza Wee: [Laughs] Well, the new *Star Trek* or the old *Star Trek*?

Lea Alcantara: Whichever.

Emily Lewis: Pick. [Laughs]

Lea Alcantara: [Laughs]

Emily Lewis: Yeah.

Eliza Wee: Okay. If it's the new *Star Trek*, then new *Star Trek* with John Cho.

Lea Alcantara: Nice.

Emily Lewis: [Laughs]

Eliza Wee: If it's just the old, probably *Star Wars*.



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Emily Lewis: All right, cool.

Lea Alcantara: Sounds good. Well, that's all the time we have for today. Thanks for joining us, Eliza!

Eliza Wee: Thank you so much. That was fun.

Emily Lewis: In case our listeners want to follow up with you, where can they find you online?

Eliza Wee: Oh, I am online all over the place. If you want my unfiltered Twitter feed, it's [@eweet](#). If you want the filtered stuff, it's [@dogmostudios](#). And I'm also at [Dogmo Studios on Facebook](#) and you can go to [dogmo.com](#).

Emily Lewis: Thank you.

Eliza Wee: Thank you.

Lea Alcantara: [Music starts] We'd now like to thank our sponsors for this podcast, [Squarespace](#) and [Pixel & Tonic](#).

Emily Lewis: We also want to thank our partners, [Arcustech](#), [Devot:ee](#) and [EE Insider](#).

Lea Alcantara: And thanks to our listeners for tuning in! If you want to know more about CTRL+CLICK, make sure you follow us on Twitter [@ctrlclickcast](#) or visit our website, [ctrlclickcast.com](#).

Emily Lewis: Don't forget to tune in to our next episode when we'll be talking about organizing conferences with Arianne Stiles and Christopher Schmitt, the masterminds behind Environments for Humans. Be sure to check out our schedule on our site, [ctrlclickcast.com/schedule](#) for more upcoming topics.

Lea Alcantara: This is Lea Alcantara ...



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Emily Lewis: And Emily Lewis.

Lea Alcantara: Signing off for CTRL+CLICK CAST. See you next time!

Emily Lewis: Cheers!

[Music stops]

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