Frustration Free
Technical Management

*Proven Techniques to Thrive
as a Manager*

JARIE BOLANDER

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Proven Techniques to Thrive as a Manager

Jarie Bolander

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JARIE BOLANDER

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Introduction: Frustrated? So Was I

But not anymore.

By applying simple techniques you too can become frustration free just like me. The trick is to figure out what frustrates you and eliminate it. Simple. You have done the first step already. You have the desire to be frustration free. That is a great first start. The act of recognizing your frustrations will naturally lead to resolutions. Good work! Let's begin by briefly reviewing the main sources of technical management frustration. In general, the frustrations technical managers deal with gravitate towards:

1. **Poorly Trained Managers:** Most technical managers don't really have the necessary training to properly manage. They usually get thrust into the role because of their superior technical ability and their ability to get things done. Just because you have superior technical ability and you get things done does not make you a good manager. A good manager makes his staff productive. Creating a good manager takes training – just like creating an engineer.

2. **Pace of Technological Change:** Technology changes so rapidly that it's hard to keep up. Most technical managers, deep down, want to be technically relevant. They struggle to keep up. This struggle can put management skills on the back burner. On top of that, managing the pace of change requires constant training of staff.

3. **Myopic Focus on Getting Technical Tasks Done:** Technical work is not the only type of work yet most technical managers only focus on getting technical tasks

done. There is a lot more to managing a team than just ensuring the work gets done. No thought is put into how the organization can improve moral or how additional requirements may effect the solution. It's just grind away at the task list.

4. **Unpredictable Development Schedules:** Innovation is hard to schedule. This makes predicating when products will be completed nearly impossible. The ensuing tension wears on the staff and creates some of the most frustrating interactions managers have to deal with.

Freedom from frustration comes from tackling them one at a time. Systematically working your way towards the solution will allow you to reduce your frustrations immediately. To facilitate this, I came up with a simple memory method to focus on the different skill areas that frustrations cluster around. Once you improve these skill areas, then sustaining a frustration free management career is a snap.

The Solution: POEMS

This book is laid out according to the POEMS method. POEMS stands for Personal, Organizational, Emotional, Managerial and Sustaining. The first four sections represent the main categories that frustrations fall into. The last teaches skills to maintain your frustration free existence. With POEMS, frustration free technical management can be achieved. Each part has a list of common frustrations that can be eliminated by using the techniques presented. The last category, sustaining, contains methods that will allow you to remain frustration free. A brief part synopsis of the POEMS method is presented below:

· **Part 1: Personal:** Eliminating your frustrations starts right now. This section gives practical tools that you can apply today. No need to get permission from corporate or your boss. These techniques are all up to you. You can control what you do. That is the first set to being

frustration free – helping yourself.

·   **Part 2: Organizational:** Once you have straightened out your own house, it's time to take a look around and figure out what organizational structures generate frustration. This step will require a little more help from other people. Don't worry about it. Once you have demonstrated that your life is in order, it's much easier to get others to change.

·   **Part 3: Emotional:** Organizational changes can only get you so far. Humans are emotional beings who don't always act rationally. Frustrations grow exponentially when tempers flare. Luckily, there are ways to deal with these difficult emotional situations. It's not easy. It's not quick but it's effective when done right.

·   **Part 4: Managerial:** The whole goal of management is to make your staff successful while attaining the goals of the company. It's not about you or your career. Managerial skills will allow you to excel by helping others succeed. Your career is important but your main job is making your staff and company successful. Everything else should fall into place.

·   **Part 5: Sustaining:** Remaining frustration free is simple. Now that you understand your frustrations and have successfully dealt with them, the sustaining skills allow to you maintain your new frustration free existence. These techniques eliminate the frustrations before they start. By continuously applying these skills, you and your team will be frustration free and more productive.

Now that you have a good understanding of the POEMS method, it's time to jump in and get to work. The first four parts has a list of common frustrations along with a methods to solve them. As you read through each section, you will start to see how applying these techniques will eliminate your present and future frustrations. The last section then presents skills that will sustain your frustration free existence. Applying all of these techniques will allow you to become frustration free!

Organizational: Organizing For Success

Frustration #13: Making The Same Mistakes

Symptoms

- *Every project runs into the same issues*

- *Known defects are missed*

- *Learning is not formally captured*

Solution #13A: Lessons Learned

After each project , you should get everyone together and figure out what lessons they learned. These meetings are a great way to figure out what worked, what didn't and how to improve your development process. The timing of a lessons learned meeting should be soon after a project is completed. This will ensure the project is fresh in everyones mind. Topics to discuss include:

- **Checklist additions:** No matter how trivial

- **Project framework improvements:** Keep it as lean as you can but strive for adding value.

- **Team organization:** Reporting structure, team size or specific roles

- **Painful product features/functions:** This is value for marketing inputs and barriers to entry.

- **What worked stellar and what did not:** Remember the good things as well. Most people will focus on the screw ups.

The results of this meeting should be a prioritized list of improvements that you want to make to your development process. Try and work on the top three before your next project if possible.

Themes will Emerge

As you complete projects, you will start to see recurring themes around these lessons learned meetings. Typically, teams tend to run into the same problems if they are systematic in nature. As the list of recurring problems get bigger, it may be time to look at the broader development process to see if there is something fundamentally tripping up your development teams.

Solution #13B: Checklists

Checklists are a great way to capture organizational learning. They are the best way to determine if you might have missed something before you release a product or pass a milestone. You should create checklists for each milestone and before you release anything to an outside party. Anything you spend money on should have a checklists associated with it. Checklists are far better than following a Standard Operating Procedure (SOP) to ensure compliance. In fact, all good SOP's have a checklist associated with it. This is the best way to guarantee compliance.

A Living Document

Good checklists grow and contract as the organization learns. As the group completes projects and debugs products, the checklists should be updated to reflect the lessons learned and provide insight into how to improve the development process. Proper use of checklists ensures a quality work product as well as a clear definition of done. Knowing when a milestone is completed or when a product can be released will allow your team to accomplish more and feel good about what they have done.

Additional Solutions

- Solution #12: Have A Process, Any Process

Frustration #14: Cross Functional Meltdowns

Symptoms

- *Integrating work products together causes defect explosion*

- *Basic features/functions are "screwed up"*

- *Assumptions across groups vary wildly*

- *The blame game is in full effect*

Solution #14: Watch Out For Interfaces

Interface failure is the biggest source of headache for any manager. This is doubly true when it comes to managing remote groups and consultants. The manager has to be diligent in understanding and communicating effectively across these interfaces since you can waste a lot of time and money if the expectations or assumptions are not well defined. Any kind of group outside of your group needs to be treated as either a remote group or a consultant even if they are in the same building. The reason being that you are not necessary privy to what goes on outside of your group, so any assumptions and miscommunication will be amplified as it moves across your communications interface.

Remote Groups

Remote groups fall into two categories: ones that report to you and ones that don't. Groups that work for you will be a bit easier to manage since they feel a connection while the ones that don't will have to feel like they work for you. This can take extra effort initially but will pay off big in the long run. It is important, no matter which type, that you include them as much as you can. Basically, your team wants to know that their project input is valuable. Go visit as often as you can and

bring other team members with you. For me, I think of a remote group as anyone that physically does not work in the same space with me, even if they are on the next floor or next town over. This may seem a bit extreme but the harder it is to physically see or talk to someone, the more remote the group. Remote groups across the state, country or world are the most difficult to manage since you have to rely on electronic means of communications. Even with the advent of on-line meeting tools, nothing is more efficient that being in the same room with someone.

Boots On The Ground

The most effective tools you have to manage a remote group is a team leader on site, the weekly status meeting and the frequent face to face meetings. You should treat the local team leader just like one of your staff and have regular one-on-ones with them. This shows commitment to the group along with giving you the inside track on how the group is performing. You also need to go visit your remote groups to make them feel part of the team. This is the most important single act you can do to ensure they want to work with you. Your biggest challenge will be to minimize the feeling of isolation that your remote group will feel. This feeling of isolation will tend to amplify bad news and cause tension when things go wrong. Regular face-to-face meetings coupled with weekly status meetings will reduce these anxieties to a manageable level.

Consultants

When hiring and managing a contractor, the same rules apply as to managing anyone, but with a twist. Consultants usually are working on multiple projects at once, so it is sometimes hard to get their undivided attention. This complicates the interactions so be crisp on requirements and deliverables. Doing this is in everyones best interest. There needs to be no ambiguity as to the requirements or achievement of them. With consultants, you also need to get a contract in place that details the work to be performed as well as how any conflicts will be resolved.

Deal with all of this up front will set the proper expectations.

Additional Solutions

- · Solution #12: Have A Process, Any Process

- · Solution #13A: Lessons Learned

- · Solution #13B: Checklists

Frustration #15: Re-solving Fixed Problems

Symptoms

- *Rehashing past solutions*

- *Reinventing proven fixes*

- *Not knowing if a problem has been solved before*

Solution #15A: Tribal Knowledge Capture

With the Internet, information is more available than ever. Taking advantage of this requires setting up collaborative infrastructure that connects your team together. These tools allow for capturing all of the tribal knowledge that your team will generate. The trick to capturing all of this great work is to make the capture tools part of your work flow.

It Starts With Good Infrastructure

Any good collaboration infrastructure starts with a solid network. This network needs to be separate from any corporate network as much as possible but accessible by the whole company. Separating the network allows your team to tweak it for their needs. R&D networks can be cutting edge and have non-standard protocols and hardware. Separating them from corporate insulates you and them from the inevitable R&D network crash. If you have a corporate IT (Information Technology) group, they will fight this tooth and nail. Be firm in your convictions and adhere to as many of their security rules as possible. With the network settled, your team will need remote access to its new playground. Creating a VPN connection is vital to a productive group since it allows remote work. This will pay off big during crunch time when you need to monitor your product continuously.

Control Your Work Product

Source control is another vital piece of infrastructure. It should be on a central server with a rational and short directory structure. My rule of thumb is that the top directory can only have seven plus or minus one number of directories. Any more than that, and it starts to get unmanageable. Adhering to this rule will also create a discipline of not going directory-crazy. There are various control systems that work great for all kinds of groups. The ones I have used are Subversion and CVS on the open source side and Visual Source Safe and Perforce on the pay for side.

Track Your Defects

Equally important to a good revision control package, is a solid bug/defect tracking system. These tools are a wonderful way to keep track of product defects as well as new features and functions. I can't ever see running a group without some form of defect tracking. It just makes so much sense to have a central repository of all of the issues you are working on. There are so many bug tracking systems, with all sorts of fancy features and functions. For me, the essential features include: multiple project tracking, categories, attachment capable, reports and web based. Some of the bug tracking systems I have used are: Bugzilla, Mantis and Trac. All are pretty good and you just need to find one that fits your needs. Whichever one you pick, make sure that you track all of your groups defects/bugs including hardware. Too often, software engineers are diligent about bug tracking while the hardware engineers just blow it off. To instill this discipline, include scrubbing the bug database in your weekly status meetings. Another good use of bug databases is to include a task category so any assigned tasks during meetings can be captured.

Capture Your Tribal Knowledge

So now you have a great network, revision control and a bug database now all you need is a way to capture all of that tribal knowledge. The best way for this is to create a group wiki. Similar to wikipedia, a group wiki allows your team to create project pages as well as capture all of

the necessary knowledge to get their job done. Wiki's are wonderful because you can link to all sorts of things. Using a wiki does not preclude the need for Standard Operating Procedures (SOP's) or a document control system. Rather, it is a way to augment them rapidly and organically. All of the wikis I have used have been open source. These include: MediaWiki, Trac and Twiki. Again, you need to figure out what works for you since each wiki has it's own markup language and idiosyncrasies.

Project Specific Email Addresses

Creating a group email reflector is another good collaboration tool. Each project should have its own reflector. All project communications should be done via the reflector so that the history can be preserved. Reflectors are pretty easy to setup (sometimes they are called email groups or forwarders). Along with project email reflectors, you should have a group reflector that goes to your whole team as well as one that goes to the entire company. The proper use of the reflector is to communicate status as well as any general project updates. It is not the venue to debug a problem. That is what the bug tracking system is for. Make sure you enforce that by only working on issues that are in the bug database.

Essential Collaboration Infrastructure

Collaboration infrastructure is essential for a properly functioning company. Set it up as soon as you can and encourage your team to use it by integrating it into your workflow. Make sure that it augments and not replaces any company infrastructure that might be required for certification or by law. A good collaboration infrastructure should include:

- An isolated network for your group if possible

- Remote access via VPN

- A central revision control system

- Bug Database

- Group Wiki for projects and tribal knowledge

- Email reflectors for your group and specific projects

Solution #15B: Where Your Group Works

Offices are evil. They represent an elitist attitude that not everyone on the team is equal. No one on your team or even you, should have an office. Offices immediately cut off team communication. The fact that someone is isolated from the team demonstrates that they are different. Cubes are bad as well. They give the illusion of privacy but don't deliver. Cubes also put up barriers to communication that are not as bad as offices but still barriers.

Remove Barriers

In my experience, the best office setup is where the team can see everyone around them. This means that no cube or office walls are in the way. This is the best way to collaborate. Some team members will complain that it is too noisy or that they cannot concentrate. Initially, this might be true, but over time, they will get used to it. The whole goal of the open environment is to allow easy collaboration among team members and to build esprit de corps. Cubes and offices just get in the way of doing that.

Encourage Interactions

Implementing this open environment requires a healthy number of conference rooms for people to meet in. Conference rooms are vital because they allow more intense collaboration without disturbing other team members. It is also important to have a common area that can be used as an open conference room for large group meetings. This area is

also a great place to put treats or demos of what the group has done. Anything that encourages the team to interact will make them a better team. Removing the barriers of offices and cube walls shows that you value open and constant communication.

Additional Solutions

· Solution #13A: Lessons Learned

· Solution #13B: Checklists

Afterword

See, being frustration free is not that hard. Congratulations. I knew you could do it.

Just remember to keep practicing and learning. Applying the solutions in this book will allow you to solve your frustrations and make your work life much easier. Continuing to remain frustration free is a matter of working on your management skills every day. Take the time. Set aside fifteen or twenty minutes each day to remain frustration free. Doing this will allow you to recognize the start of frustrating situations. Once you recognize them, eliminating them is a snap.

For additional thoughts on management, innovation and entrepreneurship, check out my blog at http://www.thedailymba.com. Thanks for reading.