TRANSLATION PROJECT MANAGEMENT

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I.   INTRODUCTION

Project management is a far-ranging subject that affects all industries and all sectors. In this article, we will analyse its importance in the world of translation.

According to the Larousse encyclopaedia, a project is "an objective that one seeks to meet."

We define "project management," in its most common form, as "the action of carrying a project through to completion according to certain predefined conditions." This article allows us to examine this concept more deeply as it applies specifically to the field of translation.

Importance of Translation Project Management

The act of translation is practised under various status and in different environments. Some translators are employed within institutions or in the public sector. Others are employed by private businesses that may have an internal translation department. In these two cases, when the "internal" workload becomes too heavy, a company may decide to delegate some projects to external independent translators or translation agencies.

These translation agencies usually have very few paid translators. They themselves rely upon their network of independent translators. In some cases, translations carried out "externally" are reviewed by "in-house" translators, also called "reviewers." We should also note that the volume of translation assignments sometimes also requires the help of "reviewers" outside of the translation agency. Generally speaking, the organisation of tasks is entrusted to a project manager. However, the project manager's role is usually not limited to the simple transfer of files; in fact, it covers many other functions.

To better grasp the concept of project management, we will examine the various stages of a translation project within a translation agency and the project manager's role during each of these stages. This presentation will also give us a sense of the diversity of projects in which translators, project managers, and others may become involved.

II.   STAGES IN A TRANSLATION PROJECT

1)   First Contact with Clients

In general, any contact with potential clients ("prospects") occurs within the sales department. However, the participation of a project manager in this communication may prove useful, or even essential. Their specific knowledge in a particular field (for example, the translation of audio components or the localisation[1] of complex software) may form a significant selling point.

The project manager's field experience will help build trust in the client, who will take this into account when comparing and evaluating two rival agencies.

For existing clients, the project manager's involvement in negotiations may undoubtedly represent an asset for the translation agency.

2)   Receiving a New Project

Some project managers are assigned to specific clients. Others may be assigned to "project types."

In both cases, when a new project is received, the client almost always requests a budget and occasionally a project plan. These documents may be developed by various people, including managers, salespeople, etc., or by the project manager.

To do this, it is advised to complete a preliminary analysis, whose scope will depend upon the complexity of the client's request.

3)   Project Analysis

Project analysis can take many forms. A quick analysis, meant to simply paint a picture of the work to be performed, will sometimes be enough. In other cases, a deep analysis, which may be factored into the negotiation process (perhaps even as the basis for a future project), may be required.

The analysis must determine:
- The project type
- The project component
- The production stages
- The necessary resources

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[1] In this case, localisation covers not only the translation itself but also the cultural and technical adaptation of the software as a whole, as well as any documents or associated modules, like help files, documentation, marketing documents, etc. Technical tasks, including page setting for documents, modifications to graphics, and also the steps for compiling, testing, debugging, etc. of the software and other technical modules, are also involved in the "localisation" of a piece of software.

Projects Types

The first stage of a project involves determining the translation project type. Many classifications may be used, but most often, projects are divided by sector:

A. "Documentation" Projects

These projects present a very wide degree of complexity; they mainly include documents to be translated.

In the most simple cases, a document contains content of an e-mail message or a CV. In more complex cases, documents mostly include, for example, user guides describing various technical and lengthy processes (computer processes, medical brochures, automobile manuals, etc.)

B. "Software" Projects

This type of project refers to localisation of software and accompanying material (documentation guides, help files, marketing brochures, licences, CD jackets, etc.).

Again, these projects may be very simple and include only interface text strings to be translated in a text editor, or they may be extremely large and complicated, requiring the translation of hundreds of files of all types and formats (Java, XML, RC, etc.), testing of translated software on several operating systems, several updates, etc.

C. "Multimedia" Projects

These are typically projects using audio and/or video elements. For example, the translation of a course containing video animations with text and voice recordings.

Such projects usually require special software that may be expensive. Furthermore, they sometimes require the involvement of other companies, particularly in the case of renting a studio and recruiting actors to record translated text.

D. "Web" Projects

This category is very extensive, as "Web" projects can sometimes combine pieces from other categories mentioned above.

Their complexity may be low (for example, translation of some HTML pages) or high (for example, localisation of a sophisticated website with animations, files, video, and/or sound and built-in software applications).

Project Components

The various project types are defined around their "components," whose size and complexity will also influence overall project management.

A. "Documentation" Projects

Documentation projects most often consist of pages of text presented in a word processing or desktop publishing application. The programs used for it offer assorted features and functionalities, sometimes specific to the operating system (for example, MS Word, Adobe FrameMaker, QuarkXPress, PageMaker, etc. on PC or MAC).

Moreover, these pages may contain graphics (for examples, diagrams with captions, images, photos, or dialog boxes) to be translated or altered within specific applications (Adobe Illustrator, PaintShop Pro, etc.).

Finally, the client may request PostScript files (PDF or PS formats) to be delivered according to the final format of the translated documents (a PDF file accessible via the Internet or printer-ready documents).

B. "Software" Projects

The heart of a software project is typically the software application itself. A collection of associated components may accompany it as well (wizards, installation script, etc.).

Documentation related to the software would be classified as a "Documentation" project, as described above. It often constitutes a major component and may span several documents, including user manuals, installation guides, quick reference cards, etc.

Another component is almost always built into the software: online help. This mainly describes the software's functionalities or interface elements, and it may also include some specific procedures to follow while using the program. Help files are most often HTML files compiled into CHM format; they may or may not involve graphics or screenshots showing interface elements.

Besides these three principal components, a software project may also include legal, sales, informational, etc. files (licences, brochures, "Read me" files, etc.)

C. "Multimedia" Projects

As in practically any translation project, the foundation of multimedia projects will be text.

But other components, such as graphics, video files with or without animations, audio files, and sometimes software files will generally round out the multimedia project.

This may consequently require a special translation process, such as subtitling or voice over, and likewise involve translators trained in this area. Depending upon the client's request, they must have software to allow them to handle the different stages of audiovisual translation (indexing, spotting, adaptation, simulation, etc.).

D. "Web" Projects

The collection of components we have discussed may integrate together into a "Web" project (PDF or other document, software components, multimedia applications, etc.).

However, these projects will rest, above all, upon Web-specific components, like "simple" HTML files or scripts (asp, php, etc.) connected to databases.

This quick overview of the various project types and their components illustrates the diversity and multiplicity of tasks with which a project manager is faced. The more a project relies upon varied and complex components, the greater the level of knowledge required to manage it.

Of course, by no means must the project manager be required to singlehandedly perform each of the tasks within a project.

However, it is fundamental that the project manager understand and grasp its size in order to determine not only the various steps necessary to accomplish the project, but also the human and material resources necessary for completing it.

Production Stages

Depending upon the project type and its various components, there may be multiple production stages. They may also vary as a result of various requirements, such as time, budget, available resources, etc.

A. Linguistic Stages

Nearly all projects include a translation phase. In some cases, this is followed by a revision step, which could itself be a distinct task associated with a specific project. Other linguistic stages may also be incorporated into a project, like a specialised technical revision (medical translation reviewed by a doctor) or the review of a manual to compare named interface elements against localised software.

B. Technical Stages

Technical stages will depend, of course, on the type of project.

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"Documentation" projects will often include page setting for documents and/or graphics-level modifications. This work is possibly followed by a quality assurance stage, whereby the final document is verified against the stated requirements. A document will be rejected, for example, if its character fonts do not conform exactly to those in the source document provided by the client.

Within a "Software" project, we will generally find steps for compiling, testing, and debugging the software. A quality assurance stage may also be planned. Its goal would be to ensure that the combined linguistic and technical stages meet established criteria, like the use of correct local values (time, date, etc.), the use of proper terminology, the correct operation of all options, etc.

By their complexity and their diversity, "Multimedia" and "Web" projects themselves may include only some very simple steps or, to the contrary, a multitude of technical steps of all types, related to the various components of these projects.

Necessary Resources

A. Human Resources

Sometimes, all steps within a project may be performed by a single person. In other cases, projects require the help of dozens of people. It is the responsibility of the project manager to assemble the project team.

The translation will be handled by one or more translators. Those translators may also be used for reviewing translations. It may even be necessary to call upon "specialised" reviewers, as described above.

It is uncommon for translators to be responsible for "technical" steps. As such, specialists in page setting will be assigned to the documentation, computer specialists will be assigned to the technical tasks within the software and websites, etc. Translators occasionally may be called upon during technical steps, for example during software testing in order to verify the relevance of some translations in context.

Organising these teams is generally up to the project manager. For large-scale projects, some may be deemed responsible for a particular team (for example, a person in charge of the translators), and even other project managers.

Indeed, in "multilingual" projects, involving several linguistic teams, it is not uncommon for the project as a whole to be managed by an "International Project Manager" (IPM) under which the "Local Project Managers" (LPM) are responsible for one or several languages. The potential structurings for such projects are numerous. Thus, the international project manager might be in contact only with the LPMs managing the technical or linguistic aspects of the project. The IPM may also lead the LPMs involved only in the linguistic portion and then direct one or more technical teams, centralising the tasks for the various languages.

B. Material Resources

In some particular circumstances or due to the nature of a project itself, it may sometimes be necessary to plan for specific material resources.

Some projects require the rental or purchase of additional computers (for example, projects involving additional people), new software licences (for example, projects requiring particular software), etc. This includes multimedia projects that require a recording or editing studio to possibly be rented. Or even projects containing brand new content and requiring specific training material to be purchased.

The project manager's role will consequently be not only to determine the necessary steps and elements involved in a project, but also to analyse the project's feasibility with respect to the allotted time, the allocated budget, and the available qualified human resources.

4)   Preparing the Estimate & Project Plan

Responsibility for preparing an estimate and project plan may belong to a number of people, particularly the project manager.

Identifying the components and tasks to be performed should make it possible to size and price the project. It is not uncommon for a single task to be assigned a price that varies according to the component. For example, the price for translating words in a user manual will, in theory, be less than the price of translating words in a software interface. Most translation agencies make price schedules available to their project managers, showing the different unit rates considered for each project type, its components, and its billable tasks (rate per word, per page, per hour, etc.). In some cases, "measurement" indicators are also available to help estimate average hourly productivity for the assorted tasks. They may consequently serve as reference points for the project manager when calculating hours to budget for specific tasks, such as the compilation and testing of online help.

These guidelines will also help the project manager to determine the number of hours needed to complete each task and, therefore, to establish a project plan.

Besides the time scale allocated to each task, it is also recommended that teams are set up and tasks are made to possibly overlap. So, for a project with a million words to be translated, it would be absurd to assign a single translator to the project for roughly 10 months and then a reviewer for 5 months after that. The project manager therefore will calculate the number of people required for each task so as to optimise the project plan. They will then analyse the possibilities for overlap among various tasks so that the project may be completed as efficiently as possible. For example, if 10 translators are assigned to the project for 3 months, it is not necessary to wait until the end of this period before beginning the review phase. This phase may begin a few weeks after the start of the translation phase, but only a well organised project manager will allow the various phases to

link together so well. To accommodate any problems or surprises during a project, extra time must be built into the project plan.

5) Launching the Project

Once the client has accepted the estimate and project plan, the project manager can begin production on a project.

Of course, it is up to the project manager to ensure that there are enough teams and that they are ready to complete the project. The project manager must also take care of any necessary preparations that may not have been carried out during the analysis stage. For example, some file types must be converted so that translators can more easily work with them (ex.: converting Adobe FrameMaker files into Microsoft Word). Furthermore, they must ensure that glossaries and possibly translation memories are up-to-date, and also that the project instructions are ready, have been adapted to the various people involved, and are understandable for all of them.

When assigning tasks and sending files, the project manager must provide the various resources with any applicable purchase orders.

These documents generally conform to a company-defined model with amounts preferably fixed according to unit prices per word or per page, for example, rather than by hours worked, a number that is always more difficult to predict.

6) Monitoring the Project

To ensure good progress throughout the project, the project manager must establish various check points (for example, partial delivery of files from translators) and occasionally contact those involved in order to anticipate any potential problems. The project manager must also coordinate terminological and technical questions, often transmitting them to the client, and distribute required information to affected parties.

File monitoring can be carried out by setting up a clear and correct directory structure on the file system (for example, Windows File Explorer), or by creating a monitoring file (with the help of a program such as Microsoft Excel or Microsoft Project) showing the current status of each file and/or affected component. Some may prefer to use special tools designed to automatically monitor files and their status (these tools being more and more often developed in-house by translation agencies themselves).

The important thing in any monitoring is that it is not so much about the method used as it is about the consistency with which information is updated. It is in fact useless to implement a monitoring procedure if one neglects to keep data current. This update also addresses a crucial requirement in that any project must be capable of being picked up by another project manager in the event of the original project manager's absence, for example.

Let's finally examine the financial aspect. Another responsibility of the project manager is to ensure the project's profitability. Of course, it is possible to calculate the gross margin at the start of the project, particularly in the analysis phase. In principle, the project manager is already aware of the purchase price associated with most tasks and, once the estimate has been established, he may therefore calculate the "expected gross margin" of the project. However, it is also important to maintain this margin throughout the course of the project by performing financial monitoring, as variations may come into play. Indeed, some unforseen tasks come up in the course of a project: the client sends new components from time to time, different volumes than those stated in the estimate, or product updates generate additional steps. All of these changes can affect the margin, which therefore must be monitored throughout the duration of the project. Controlling the margin is sometimes handled by a superior or by a representative of a finance department manager.

7)   Completing Production

Before delivering the project to the client, the project manager will make sure that all steps have been carried out, specifically double-checking the client's original instructions. The project manager will verify, of course, that all of the components and files are present and that they meet predefined criteria (for example, names), and then will deliver it all as planned (by e-mail, FTP site, etc.).

After delivery, the client may submit comments and criticisms ("feedback"). It is then up to the project manager to evaluate the extent of possible modifications to be made. Has the client made corrections directly or must they handle them themselves and, in this case, who in particular must do so? The resources who worked on the project? Or is it necessary to find someone more skilled? Is the client's negative reaction the result of a quality issue or a more subjective preference they have expressed, or have they changed their mind in regard to the original instructions?

According to the answers to these questions, a financial analysis may or may not be performed in order to determine if any potentially new stages will be partially or completely charged to the client. Furthermore, it must be determined whether credit notes should be applied to those responsible or whether they must simply be held accountable for the additional work required by such feedback.

8)   Post-Mortem

We often use the term "post-mortem" to describe the stage that involves a sort of autopsy of a project in order to close it definitively. It entails developing a report and/or holding a meeting or teleconference, for example, allowing those involved to review the essential points of the project. This stage may also take place at the end of a series of related projects, if need be.

It should be noted that the purpose of a post-mortem is not simply to identify the problems that were encountered. Its main function consists of highlighting the solutions that were used to resolve these problems, the initiatives that deserve to be addressed, and any other factors that played a role in the completion of the project.

Apart from providing a post-analysis of the project, the report's purpose is to generate suggestions or recommendations for future projects. It therefore must be written in this spirit so that it may be useful for other projects and/or other project managers.

9)   Archiving the Project

At the end of one or more projects, they must be archived. This normally takes place in accordance with a well-defined procedure. It must follow a precise naming convention and filing system so that anyone needing to consult or reuse the project (for example, for an update) can easily locate it.

III. CONCLUSION

Role of the Project Manager

In conclusion, the role that the project manager plays is essential, particularly in large-scale projects and in projects involving many components. Those who hold this role are unlikely to have all of the special knowledge necessary for all of the stages mentioned here, but they must have enough skills to correctly identify the fundamental tasks via a proper analysis, establish a budget with a respectable margin, plan the proper steps, select adequate resources, monitor the project, and deliver the necessary components to their client.

Of course, communication skills are also essential. One of the main objectives of a project manager is to act as an inside contact for the client and to serve as an intermediary between the many people involved. A project manager must also exercise great care in communicating instructions and transferring information between everyone involved.

Benefit for Translators

Presenting the work of a project manager to future translators

As we have said before, a large portion of independent professional translators work for translation agencies. They are generally in contact with one or several project managers. In some cases, they are the only translator assigned to a project; in other cases, they work within a larger team. These teams are typically "virtual" teams, meaning that their different members never physically meet and that they are even unaware of the number, names, and details of other people working on a project.

Within such projects, the translator's position can quickly become relatively unclear. Mainly for the translator himself, who can experience some difficulties in positioning himself within the process toward completing the overall project.

Typically working from home, the translator remains mainly "isolated" from the overall process. It is often difficult, or even impossible, for the translator to get a sense of his exact role and to understand the impact of some instructions or requirements imposed by the project manager. Why is the use and compliance with this or that file format so important? What specific machine setup is required to carry out a given piece of translation? Is it truly necessary to respect deadlines, which are sometimes defined to the hour? Primarily assigned a linguistic role, the translator can from time to time ask such questions without so much as grasping the importance of specific points in the success of the project as a whole.

An introduction to project management within targeted courses in translation schools allows future translators to understand the professional world they are entering and the importance of their involvement in large-scale projects.

Besides, understanding the many reasons for a project manager is far from useless for an freelance translator. Demonstrating precision and professionalism, especially in preparing an estimate or in establishing a rate schedule, can easily play in favour of a freelancer. Understanding how project management works can also persuade future translators to broaden their professional activities, networking for example with other translators, and even technical consultants, with the intention of closely collaborating on large projects that they would not be able to complete alone. And why not, in such cases, acquire "as a team" some juicy contracts with direct clients...

Author's Note

Project management is a very prominent concept in the translation industry. In client companies or in translation agencies, those who serve as the main point of contact for the market are more and more often called "project managers." Within the translation industry, they are a true asset, though not necessarily a vital condition. Targeted training, allowing translators to grow within the translation industry through a better understanding of the processes in which they will take part, can undoubtedly prove to be a major advantage for their future careers.