Project Management (DCM302)

DePaul University

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I recently had the opportunity to lead a project to implement a new reporting and dashboard solution delivered through a new online Client Relationship Management (CRM) system at my firm. This solution was delivered to the sales leaders and professionals in the Wealth Management unit at my firm to help increase adoption of the new CRM system and to provide better and more data to manage the sales division and make more informed business decisions. In addition to the role of project manager on this project, I also handled the creative development of the solution that was implemented by following the creative process. I led this project through all major phases including planning, build-up, implementation, and closing, which included gathering feedback for validation. This prior learning experience is consistent with the learning outcomes of the course, DM302 - Project Management – Design and Assessment.

Key Roles and Responsibilities of a Project

A project team is comprised of stakeholders that represent themselves or groups that are affected by or have an interest in the project and will benefit from its success. In my experience as this project's manager, I learned about the different stakeholder roles that are important in a project and what the responsibilities of each role are. The main roles are project manager, decision makers, customers, sponsor or champion, and the implementation team. Through this project and prior experience working on others, I learned how important it is to identify the right people to include in the project to ensure success. One way to identify the right stakeholders is to perform a stakeholder analysis. The stakeholder analysis is an activity to identify and map out all those who can or will be affected by the project and its outcome. Once parties have been

identified, the groups or individuals are ranked in priority based on how affected they will be, whether or not they have authority over decisions, and potential engagement/participation level that should be expected or requested. Although not all parties will be involved in every discussion about the project, it is important to include representation from all affected groups in order to avoid opposition or negative influence by those who were left out (Smith, 2000). Based on the stakeholder analysis, it was clear which roles were affected, sales managers, sales professionals, managing directors / leadership, and sales support. Since the sales professionals and managing director groups were very large customer groups, I created a smaller representative group to consult on the project. This group was formed by a combination of recommendations I received from sales managers and those that I identified on my own, based on prior experiences in working with them. Some of the characteristics that helped identify individuals for the representative group were that they welcomed change, had curiosity of the new system and/or were early adopters. It was also important to identify individuals who were able to articulate feedback in a meaningful and constructive way, which could be decided based on their answers to some basic questions. One of the main goals of a stakeholder analysis is also to "develop potential coalitions of support or, if necessary, reduce negative impact of unseen opposition" (Smith, 2000). Achieving buy-in from the customer group was very important because it would help influence others before, during and after implementation.

Project Manager. As the project manager, I was responsible for leading the project which included identifying the proper stakeholders; engaging customers to help establish goals and confirm requirements; communicate status updates with all related parties; seek and obtain approvals / decisions from managers with authority; and ensure that the project kept moving forward. Alvarenga et al. (2018) researched whether or not a project manager factored into the

overall success of projects and concluded that the success of a project can be attributed to the project manager.

Creative Developer and Resource Manager. In addition to being project manager on this project, I also developed the solution by going through a complete creative process. The creative process consisted of brainstorming for the best ideas; deciding on which ideas to dismiss and move forward with; the creation of the dashboard; then validation by the customers. During the implementation phase, I also took on the added roles of team leader of the implementation team or resource manager. I developed the implementation using a Work Breakout Structure to document what each person would be responsible for. As part of the implementation plan, I also ensured the implementation team had the necessary resources to complete the rollout, such as appropriate system access, FAQs, and instructions.

Customers and Decision Makers. The other key stakeholders of the project were the customers, which in my project were managing directors, sales leaders, and sales professionals in Wealth Management. The customers helped define the requirements, while the sales leaders were tasked with making final decisions, such as which reports were priorities, validating the organizational strategy to align with.

Sponsor. The project sponsor was my own manager. She served a dual role as she was also a decision maker as a sales leader. She helped promote the project with the customers and other leadership to help establish top-down change management and support.

> According to Tayntor (2010), the project sponsor or champion is the motivating force throughout the life of the project, the spokesperson, and the destroyer of roadblocks. An effective champion will: believe in the value of the project; be fully committed to the project's success, including being willing to invest his or her own time to promote the

> project; have the authority to obtain funding and other resources; have enough political clout and persuasive skills to convince others of the project's value and; although it is not mandatory, it is also helpful if the champion has a stake in the outcome, the proverbial 'skin in the game' (p. 32).

Project Plan

Through my experience I learned the importance of establishing a project plan by documenting the project charter, the project roadmap or schedule; and communication and implementation plan. The project charter includes key stakeholders, goals, and a description of the project. It can also include any estimated costs of the project, if applicable. The project plan was not documented in a standard project management software, due to the size of the project. At my organization, this type software is only used for the larger corporate-wide programs that the project management office (PMO) runs. Even though the project was small, I attended to all four major phases/stages of a project including, planning, build-up, implementation and closeout. "Whether you're in charge of developing a website, designing a car, moving a department to a new facility, updating an information system, or just about any other project (large or small), you'll go through the same four phases of project management: planning, build-up, implementation, and closeout" (Harvard Business Review Staff, 2016). Once I received the approval to move forward, I began the first phase of the project.

Planning Phase. The first step in the planning phase was to identify the problem, the desired future state, goals, and requirements in order to document them in the project plan and charter. For my project, the problem I was solving was two-fold. The first problem was that there was poor adoption of a new Client Relationship Management (CRM) system at my

company, [REDACTED]. Even though it was communicated that the new system had many more capabilities than our legacy system, we found that adoption was poor. This was largely attributed to poor training and change management. Another problem we faced was that there was a desire from senior leadership to have more actionable data available for the sales division to be able to make more informed business decisions. Up until this point, we had only been able to track closed/won business. Historically, we did not have good data to forecast new revenue, manage the pipeline or drive business strategies through data.

The next step in the planning phase was to build a schedule or roadmap of the project. The roadmap is a timeline of important steps in the project. It provides an overview of the key milestones, helps set and maintain expectations, and indicates when the project will end. According to Dinsmore (2005), "a project requires a plan or it will never accomplish what is required by the due date. The plan is used to keep the project on track— a project manager knows where the project is in relation to the plan and can also determine the next step (p. 28).

Build Up. In the build up phase I worked on further defining and building the solution to address both of the issues we faced, which was a new reporting dashboard for managing directors and sales professionals, utilizing our new system. This solution addressed the problem of adoption by creating a new capability that did not exist in the old system. The reporting dashboards would create curiosity and a need to use the new system. It also would transform the perception of the new system from just another system to enter data, to being a helpful resource. The reporting would provide easy access to information that had never been available before. The solution would also create visibility into some of the actionable data that was desired by leadership to help make business decisions and create a mechanism for managers to drive strategy by focusing on certain datapoints.

When building a solution, “the first step is identifying the customer’s needs and creating a detailed scope of work before estimating. . . to know the customer and identify what project success means to them” (Kielmeyer, 2019, p. 36). It is equally as important to also define what is not in scope and will not be addressed with the project. Tayntor (2010) asserted, “It is essential that the entire project team and the customers who requested the features understand what will not be included and why. Not only is informing the requestors common courtesy, but it is also a way of avoiding unrealistic expectations” (p. 64). Defining the scope helped make some of the decisions on what to include on the dashboard clear.

It was also in the build-up phase that I began working with and learning the new reporting function. I spent a couple of months learning the capabilities in a number of different ways. First, I completed on-line training that was offered by the vendor and visited member boards to seek answers, tip, and best practices. Next, I ran reports, analyzed the data, tested data, and compared to our legacy system to confirm accuracy. Once I had a good understanding of the reporting, I needed to learn and understand the needs of the customers. To do this, I interviewed various levels of sales management, managing directors and sales professionals, to learn about their needs and how reporting and data could help them manage their teams and their pipeline, as well as track sales production and sales activity. I put myself in their shoes as managers and sales professionals to understand how data could help them. After I digested all of the information that I learned, I began to create the reports and dashboard. I analyzed the best ways to present the information using the different charting types to ensure that the information was easy to understand and work with. I worked with the sales leaders to make decisions and prioritize which reports and data would be used to highlight data that aligned the dashboard with

corporate goals and leadership strategy. At the end of this phase, I completed the first prototype of the dashboard.

Through this phase I learned how to use active listening, communication, and interpretation skills that helped me understand the requirements and desires of the users. I also learned research skills from researching the new reporting capabilities, how other companies were using the tool and what the limitations and pitfalls were. I learned how to analyze data, identify trends and find the stories through the data. I also used analytical skills in the creation of the reports and charts to ensure the visualization of data was clear and helpful.

Implementation and Execution The next phase of my project was the implementation phase. I created an implementation plan which started with a beta test group which was a small group of customers. The beta group worked with the new prototype for a couple of months. Throughout the beta, I collected feedback from the beta users, which led to changes in order to make the tool more helpful. The customers validated the solution as good and helpful. After the beta test, the next step was to implement the dashboard more broadly to sales managers, leaders and professionals nationally. During this phase, additional project team members came on to the project to help implement the rollout. Based on the Work Breakout Structure, each member was able to understand what they were responsible for and how their work fit into the schedule. In order for the implementation team to be effective, I provided step-by-step training on how to implement the roll out and to ensure the they could field questions received.

The implementation plan also included a communication and training plan that I developed with the guidance of the customers and sponsor. The communication plan included announcements over various communication medium such as e-mail and internal social networking. As part of the training plan, I facilitated training through live audio-visual sessions,

recorded audio-visual, and provided white glove one-on-one sessions for senior leaders. I also created training content in the form of written guides with helpful visuals, short vignettes for tips and tricks, and a support model.

In this phase I learned the importance of communication and change management in a project that delivers a new technical solution. As Verzuh (2016) pointed out, "much experience has demonstrated that it isn't enough to *tell* people to change; they must be actively engaged to win their cooperation" (p. 110). Change management was addressed mostly through the communication and training plan by delivering important information and key resources. Additionally, establishing support and buy-in at the executive level. In this phase I also appreciated the project and implementation plan because it kept everyone on track and accountable.

Closing. "Before closing out your project, your team needs to meet its goals (or determine, along with key stakeholders, that those goals no longer apply). Compare your progress with the scope everyone agreed on at the beginning. That will tell you how well the project has performed—and if there's still work to do. When you discuss your findings with your stakeholders, make sure you reach consensus with them on how 'finished' the project is. Keep your scope front and center so everyone uses the same yardstick to measure success" (Harvard Business Review Staff, 2016). In the last phase of the project I solicited feedback from the users of the new dashboard approximately 6-9 months following implementation through a survey. I analyzed the survey results and feedback that was provided. The survey revealed areas some areas for improvement, but overall was very positive and confirmed the success of the project. The survey results also led to additional training resources being made available and revealed the need for agile approach to enhancements of the dashboards. I documented the success of the

project in the project plan document, which included the project map/timeline, participants, and survey results compared to the objectives. I presented this document to sales leadership to share the success of the project.

Risk Management

The project risks and contingency plan for my project mostly came in the form of data security, which there is heavy focus on in my industry because of security breaches and clever digital criminals. I had to ensure that the new reporting did not create new risks for unnecessary access to data, while ensuring that the data the users needed was accessible. I created an access model and presented the model and second option to the managers / decision makers for approval. The contingency plan involved adding additional security measures. There was also risk that the data would be inaccurate, which could lead to bad decisions or affect financial reporting. This was addressed in the build-up phase through testing the data. Another risk was that the new solution would not be adopted or validated by the customers. To address this risk, I worked with the sponsor, customers and decision makers to ensure that we had top-down buy-in from leadership to help drive adoption. Thus, my approach of the risk management is consistent with that detailed by National Academies Press, (2005) "there are many ways to approach risk identification. Two possible approaches are (1) to identify the root causes of risks — that is, identify the undesirable events or things that can go wrong and then identify the potential impacts on the project of each such event — and (2) to identify all the essential functions that the project must perform or goals that it must reach to be considered successful and then identify all the possible modes by which these functions might fail to perform" (p. 24).

Project Economics

The project that I worked on was relatively small and there were no costs other than my own time and that of a few other project team members who came on for implementation. Although this particular project did not have a budget or cost considerations, I have learned about project economics through my participation as a stakeholder in many other projects. Funding estimates are decided based on staff resources, which could be both internal and external consultants, and usually dependent on the hours of work, licenses or purchase of technology or other resources. When project funding is limited, projects need to be prioritized; according to cost, time, and resources, then get approval from business managers/decision makers. As a stakeholder I have experience in prioritizing tasks based on cost, value-add and requirements for risk/compliance. My actions reflected Verzuh's (2016) assessment, "ideally, your firm has specific selection or ranking criteria. . . Projects typically fall into one of the following categories: compliance/regulatory; efficiency/cost reduction; or increased revenue" (p. 86). I was aware of all these facts and made sure that it was done effectively.

Throughout this project, I gained extensive learning in project management. I learned about the various roles of stakeholders, why they are important and how each role contributes to the project. It is very important to communicate with the stakeholders and get their engagement to make decisions, confirm requirements and validation in order to keep the project on track. I also learned about the different phases of a project and documenting requirements, goals, stakeholders, and milestones in a project plan. Finally, I learned about the communication and change management considerations that are present whenever implementing a new technology solution and how important training, communication and support are in those scenarios.

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