AMAQuarterly

Interview with
Allen Adamson and Joel Steckel

Be Adept at Shifting to Get Ahead

Page 16

www.amanet.org

AMA | GLOBAL™

Case Management Evolves to Cure
COMPLEX PROJECT MANAGEMENT

BY SARA BROWN

Throughout my career in project management, there's a book I've regularly returned to called *The Checklist Manifesto: How to Get Things Right* (Metropolitan Books, 2009).

In it, the author Atul Gawande—who is a surgeon by day—writes about the important role checklists play in everything from performing surgery and flying a plane to building commercial high-rises and running a business.

According to Gawande, no matter the circumstance, boiling down what needs to get done into a series of steps that can be followed in a specific sequence not only breeds efficiency but also can dramatically reduce errors. However, despite the best-laid plans, curveballs are inevitable. Gawande says communication is the essential ingredient for ensuring successful outcomes when unexpected situations arise. He advocates the use of checklists to complete standard processes and create a system that enables open and effective communication and collaboration for handling the unplanned scenarios that inevitably occur.

By definition, project management involves a specific set of operations—initiating, planning, executing, monitoring and controlling, and closing—designed to accomplish a singular goal. Many would agree that project planning is the linchpin in project management. Identifying and recording the goals, budget, timeline, resources, execution steps, and dependencies gives the project team and stakeholders an articulated set of expectations, an estimated delivery schedule, and a control artifact against which to measure progress.

In theory, a strong project plan will result in a successful, completed project that has met expectations. But a plan is not enough, in and of itself, to guarantee success. The project plan "checklist" is rarely sufficient because projects are rarely static. In reality, project management demands fluidity.

On top of surprise variables and unexpected wrinkles, projects can be complex and unwieldy. Shifting requirements, constrained resources, and dispersed teams all add up to complexity and make effective project management essential. Despite their defined, structured processes, projects don't unfold linearly as they run their course—especially in today's business arena.

At the same time, the bar for success is set even higher. An increased focus on project outcomes beyond the typical project-specific metrics has emerged as the C-suite is holding managers throughout the organization accountable for delivering results aligned with the company's strategic goals.

DIAGNOSING THE PROBLEM

According to Project Management Institute's 2017 "Pulse of the Profession: 9th Global Project Management Survey," 32% of projects lost their budget upon failure and 14% were deemed failures. Nearly 50% of respondents' projects experienced scope creep or uncontrolled changes to the project's scope. It may seem that with the many great technologies available these days to plan, monitor, and analyze data, projects should be simpler and easier to manage, but PMI's survey shows that 41% of respondents considered the projects they took on to have a high level of complexity involved. These figures are more understandable once you consider why.

Projects have become more complex due to a number of factors: more systems, more data, more geographically dispersed resources, more communication channels, more security requirements, and more regulations, to name a few. Ninety-three percent of PMI's survey respondents said that their organizations use standardized project management practices in at least some departments, and 55% said that they are used in most departments if not throughout the organization.

When you're dealing with an array of people, systems, data, deliverables, and regulations, directing and managing project work can become convoluted. In the face of these complexities, flexibility is essential. A growing trend to address this need is the embrace of agile methodologies by many project management offices (PMOs).

Seventy-one percent of respondents to PMI's Pulse survey reported that their organizations are using an agile approach for projects at least some of the time, and 41% of the projects themselves are using an agile methodology or a hybrid agile approach. Among successful organizations (defined by PMI as those "with 80% or more of projects being completed on time and on budget, and meeting original goals and business intent"), a majority use agile approaches to projects.

Leveraging agile methodologies is helping to drive project success by introducing shorter delivery cycles, scope flexibility, requirements evolution, and team empowerment. Flexibility promotes project health as unforeseen situations and complications require deviation from the project plan. Sometimes these deviations may be significant, requiring extra time and resources not planned for—leading to the introduction of unstructured processes. Unstructured processes are the flip side to structured processes that have limited and previously known and defined paths, with routing driven by variables that are part of a known, finite set. That's why agility is key.

THE PRESCRIPTION YOU NEED

But an agile approach itself may not be sufficient when riding waves of complexities. Supporting tools and systems are essential when dealing with the complex projects of today. Standardized practices go hand in hand with standard technology, but these project management solutions aren't typically equipped to handle complexities—especially within the execution phase. Even robust project portfolio management (PPM) tools that excel in planning, monitoring, and control, such as Microsoft Project, struggle with delivering value in the execution of a project. This is the very place where the meat of any project lies and, frankly, where most project managers face challenges. There is a void.

Of course, there are many tools and processes that support agile methodologies, and these can provide substantial benefit during the execution phase. But what you need is a framework that will provide the flexibility to manage both structured and unstructured processes, and this has become more critical as projects have become more complex.

On the one hand, you've got tried-and-true PPM tools that handle the planned, structured processes effectively. And on the other, you've got agile tools designed to support unexpected, unstructured processes. How do you utilize these together to drive successful execution of a complex project? Technologies that comprehensively support the execution phase of a complex project are harder to come by, and to some extent, project managers may not even be clear on what they actually need or should be looking for in a solution.

JUST WHAT THE DOCTOR ORDERED

Cases, like projects, have a distinct beginning and end and require collaboration. The difference lies with procedures, which aren't strictly defined; the collection of steps needed, which may differ; and the order in which those steps will be followed, which can change at any time. Depending on the people involved and the data you've collected, you may find that the activities and the route they follow vary for every case you manage. In short, the process is unstructured.

> "What you need is a framework that will provide the flexibility to manage both structured and unstructured processes, and this has become more critical as projects have become more complex."

If you've ever been unlucky enough to be involved in a car accident, you've seen a perfect example of traditional case management—a police report. Such reports start out with a standard form, capturing data about the unwilling participants and a set of details unique to the circumstance. However, the process can follow a multitude of paths, depending on the facts surrounding the accident. Typically, many different people are involved, and the steps involved and the order of those steps are determined by the specific instance, or accident. Ultimately, a case has a disposition or closure.

As the example above shows, collaboration and information sharing are needed more than structured task management and planning. And the process must remain fluid because new information that might change the plan arrives constantly. Hence the emergence of systems and tools for case management.

As the need to accommodate ever-greater complexities has increased, technologies have greatly improved case management and case outcomes. Case management systems can solve challenges that most standard project management tools can't. These systems can better gather and archive data, simplify collaboration and communication, and grant greater visibility and governance.

Let's examine how a Fortune 500 U.S. consumer goods company might approach a research and development project. Imagine you are part of a team tasked with creating a new formula for your company's laundry detergent. Charcoal-based consumer products have expanded beyond their traditional odor-elimination and water purification markets to the personal care market, fueled by consumers' fascination with "natural" and "organic" products. The challenge: How do you incorporate charcoal into your detergent without impacting the whitening effects of your most successful, market-leading formulation?

Each R&D trial for the new laundry detergent entails bringing together different ingredients, equipment, and personnel. These variables translate into a high probability of deviation from the original plan. Every tweak to the formula will require more testing until you are finally ready to take the detergent public. At a very high level, this process seems structured and repetitive. Still, every time you run through a test, you never know what you're going to find.

While a standard project management tool is sufficient for handling a single run-through, the odds of getting the formula right the first time are slim to none. The PPM tool simply won't predict how many different iterations you'll do before developing a shelf-worthy product, and it will barely prepare you for multiple rounds of testing. As a result, you'll end up wasting your organization's resources and will most likely take longer to complete the development cycle.

What you need is a system or technology that enables you to better track your activity and capture all the data from each run so that the results can be accessed and analyzed for future product development. All the while, this tool should automate repetitive processes within the project, such as scheduling equipment and ordering supplies. As projects have become more complex, implementing technology that's flexible enough to manage both structured and unstructured processes during the execution phase has become critical. Yet managing the processes of a case isn't the only capability you need.

WHAT'S UP, DOC?

Let's not forget Dr. Gawande's finding, as there's a lot of wisdom in what he has to say. Having a system in place that allows you to effectively communicate, collaborate, and manage information from all involved parties is essential to keeping your team's project execution on track when complexities exist and unplanned factors arise.

Any given project for a large enterprise requires the involvement of multiple teams—all with differing perspectives and work styles. Rarely are the people involved in a project

huddled together in the same conference room. Each person on the project is bringing his or her own point of view and set of priorities. With so many specialists in the house, who's taking care of the patient? That's you—the project manager. You must be able to keep your focus on the overarching project goals of quality, speed, and budget while bringing together the multitude of stakeholders and their different agendas.

When it comes to the intricate projects that abound in today's enterprise, case management solutions may be the answer. By bringing the tools and processes needed to support a complex project, you are treating it like case management.

One such example involves a client in the marketing industry. The company implemented a case management system to better execute digital marketing campaigns, which required involvement from hundreds of different agencies in addition to the agency's internal team. Initially, the company needed to figure out how to give all parties involved greater visibility into the many different components tied to each campaign project. The agency not only needed to know what technical assets existed, but also whether a similar idea or campaign had already been executed for the client.

A standard project management tool alone would not have been flexible enough to account for and deliver what the organization required. Instead, a case management system brought order to volatile processes associated with the campaigns, yet still allowed things to unfold organically. Clients could review and approve digital assets and campaign elements within the system, which would notify the team members working on those campaign tasks, curbing downtime. Plus, all assets were stored in one easy-to-use portal. In addition to creating greater efficiencies, the system improved collaboration. Everyone working on the campaign had a real-time view of campaign progress, communicating seamlessly within the system and tracking their exchanges for reference later.

THE ROAD TO RECOVERY

As mentioned earlier, in the world of enterprise-scale business where complications come with the territory, case management is incredibly valuable. However, it's not my intention to say that case management should replace traditional project management methodologies or solutions. It's meant to overlay project management, providing added support to ensure successful execution during complicated scenarios.

Here is another example: I work with a technology company that specializes in manufacturing precise components for electronic devices. The management team recently deployed case management to better handle product lifecycle management processes, but they weren't solely reliant on such a solution. Instead, they use case management to enhance, not replicate, project management.

In this instance, it was specifically the product lifecycle management phase of new product introduction for which they needed a solution to optimize execution. Each new product introduction project entails everything that needs to happen from the time a new component completes the research and development cycle to the time it hits the market for sale to electronic device manufacturers. Many steps and processes occur in between, from formulating technical specifications within strict quality limits to determining the precise process necessary to reliably manufacture the products at scale, and from producing the molds and forms needed for production to designing and developing the packaging materials needed to supply the company's customers.

This is an example where case management makes sense. All of these processes are coordinated, and everyone has access to whatever they need to do their job. A case management system doesn't replace the need for strong project management disciplines, but it dramatically improves the project manager's ability to execute complex projects by aggregating large amounts of data, allowing for deviation from the plan, tracking the unstructured things that happen, fostering collaboration, providing controlled access to artifacts, and enhancing visibility into project status in real time.

FULL STEAM AHEAD

Because enterprises operate globally, the amount of information being exchanged will only continue to increase exponentially. Similarly, as project complexity progresses and the amount of data involved continues to increase, case management will continue to evolve and enhance project management. Technology is growing too.

Low-code case management software will play an increasingly large role in project management as it places more power back into the hands of business teams who best understand various projects and processes. These teams will be empowered to update solutions through configuration directly and quickly as needs change, since they understand them the best. Business teams will be able to evolve their case management solution, and if it's been built on a low-code platform, they can simply update workflows themselves instead of having to tap others who are unfamiliar with what's needed. Ultimately, this becomes a much more efficient approach to managing your project management.

Additionally, the incorporation of machine learning into case management technology will advance its capabilities for project management. The expectation is that it will predict what might happen next and flag risks to be addressed before there's a negative impact on the project. AQ

Sara Brown is a professional services manager at PMG, which automates processes and integrates systems while improving user experience and enhancing collaboration, to deliver better results, faster, to business and IT managers.