

Case Study: All Company Training, LLC

A note about this case study: This case study is not meant to be an entire write up of a client project. Rather, it includes a number of concepts discussed throughout the book to provide the reader with some context for how the concepts may be applied in a real life situation.

Chapter 1

Background

All Company Training, LLC has been in business for eight years. They are based in Chicago, IL. They service mid- to large-size global organizations by sourcing training to meet company needs. They do this by establishing relationships with other training companies and/or individual trainers throughout the United States and globally. Training may be in technical skills (such as Microsoft Office® products) or in critical skills (such as negotiation, project management or communication skills.) All Company Training started with two salespeople and has since grown to 15 sales people, one sales director, and a Vice President of Sales. They support a client base of 50 national and global organizations. All Company Training is currently in a growth spurt and expect to add, among other roles, 10 more sales people, two sales managers, five more marketing professionals and three operational support personnel within the next two to three years.

All Company Training is beginning to see increased competition for their services by companies that seem to rely much more on technology to service and support their clients. Most recently, at an industry event, All Company Training's CEO heard from a few clients that they felt that support was not as high quality as it should be and they were uncertain if All Company Training could continue to support their needs. One client executive told the All Company Training CEO he was entertaining switching to another partner even though he has been with All Company Training since its inception eight years ago. He told the CEO of All Company Training that he felt the employees of All Company Training was not as responsive and did not meet their requirements and quality expectations as they had in the past. All Company Training's employees, the client said, seemed disconnected from each other.

In reviewing further the comments the CEO received, and in a conversation with the Board, it was decided that All Company Training was still functioning as if they were a start-up organization. There were very few

formalized processes, procedures and controls in place to ensure consistency and accuracy in supporting a diverse and growing client base.

Chapter 2

Launching the BPI Project

It was decided that Sales, Marketing and Operations would be the first functional areas examined for process improvement since these departments either drive, or support driving, revenue for the organization and enable for profitability.

Lisa Smith-Rusch, a project manager with five years project management experience, was tasked by the CEO with leading the business process improvement project. The sponsor of the project is the CEO, Donald Jackson.

Mr. Jackson handed Lisa the Charter for the project (Exhibit 1.) Upon review, Lisa noted a number of “open items” that she felt needed more clarification for her to be successful with the project. She reached out to Mr. Jackson’s assistant to schedule a meeting.

The Meeting with the CEO

In the meeting with the CEO, Lisa asked the following questions:

- Are the three key departments involved in the initiative aware of the launch of the project?
- What evidence existed that gave the impression that there was a lack of sufficient collaboration between the three key departments?
- How flexible was the budget for the project?
- What other major initiatives have been, or will be, launched within the organization that may impact the budget, team resources or participation from the three key departments?

She also asked for the following items:

- Past customer survey results
- Current revenue figures (or, dollar figure expected in increase of revenue)
- More specifics around the desire for improved profitability

The CEO responded to each of her inquiries and provided some additional information as requested. He told Lisa that while each department head had been notified of the project and fully supported it, their staff were likely not yet notified, or, if they were, likely had a number of questions that needed to be answered.

Project Name: Process Improvement Initiative: Sales, Marketing, Operations
Project ID: ACT-BPI-SMO
Project Sponsor
Name: Donald Jackson
Title: CEO
Business Unit/Department: Administration
Email: Donald_Jackson@allcompanytraining.com
Phone: (555) 555-5555
Project Manager
Name: Lisa Smith-Rusch
Title: Project Manager
Business Unit/Department: PMO - IT
Email: Lisa_SmithRusch@allcompanytraining.com
Phone: (555) 555-5555

Project Manager Authority Level	
<ul style="list-style-type: none"> • Determine team members needed for project • Manage to budget provided • Determine priority of work with each department impacted (Sales, Marketing, Operations) • Manage all project communications • Make project decisions that do not impact the timeline by more than 3 weeks and/or impact the budget by more than \$5,000 	
Project Business Case	
<p>There is a need for formalized processes, procedures and controls to ensure consistency in supporting the customer base. Formalized processes, procedures and controls will enable for:</p> <ul style="list-style-type: none"> • The ability to more effectively compete in an increasingly competitive environment • Increased customer satisfaction and better support of customer needs • Retention of current customer base • Improved collaboration between Sales, Marketing and Operations – 3 key functions within the organization • Increased revenue and profitability within the organization 	
Project Description	
<p>Analyze current and develop new/refine processes and procedures within Sales, Marketing and Operations.</p>	
Project Objectives and Success Criteria	
<p>This project will be considered successful if the following occurs:</p> <ul style="list-style-type: none"> • Increased customer satisfaction • Improved support of customers • Retention of current customer base • Improved collaboration between Sales, Marketing, Operations • Increased revenue • Improved profitability <p>See Section – Project Benefits – for more details.</p>	
Expected Risks	
<ul style="list-style-type: none"> • Sufficient support for initiative from stakeholders in Sales, Marketing, Operations 	
Functional Organization or Business Unit	
Name	Participation Level
Sales	<ul style="list-style-type: none"> • Assist in documenting current processes • Assist in designing “to be” processes • Respond to surveys, attend interviews, etc.
Marketing	<ul style="list-style-type: none"> • Assist in documenting current processes • Assist in designing “to be” processes • Respond to surveys, attend interviews, etc.
Operations	<ul style="list-style-type: none"> • Assist in documenting current processes • Assist in designing “to be” processes • Respond to surveys, attend interviews, etc.

Project Benefits	
Benefit	Project Business Impact Expected
<ul style="list-style-type: none"> improved customer service 	<ul style="list-style-type: none"> increased customer satisfaction (score of 4 out of a 5 point scale on the customer satisfaction annual survey) retention of current customer base
<ul style="list-style-type: none"> closer collaboration between Sales, Marketing, Operations 	<ul style="list-style-type: none"> increased efficiencies in supporting customer needs (reduce response time to customer inquiries from 2+ days to less than 24 hours; reduce time to source and schedule training from 4 days to 2 days) improved sharing of information between 3 key departments (reduce rework by sharing customer information and ensuring no overlap of processes)
<ul style="list-style-type: none"> increased revenue and profitability 	<ul style="list-style-type: none"> goal of increase of revenue by 10% within first year of implementation of project improved profitability due to increased efficiencies in supporting customer needs through more effective processes and procedures
Project Milestones	
Milestone	Completion Date
Project kick off	August 20xx
Prioritized, detailed project plan developed	September 20xx
Initial meetings/data gathering sessions with key stakeholders complete; surveys complete	December 20xx
Current processes documented	February 20xx
“To be” processes designed	April 20xx
Processes tested and refined	July 20xx
Finalized processes, training completed	September, 20xx
Project Budget (Estimated? or Final?) Budget Provided: \$200,000 - \$300,000	
Project Expenditures	
Expenditure Types Expected	Estimated Cost
Contractor services	TBD
Surveys/interviews	TBD
Team off-site meetings	TBD
Stakeholder meetings	TBD

Exhibit 1

The senior executives and Board were concerned that there seemed to be limited, if any, sharing of information between the three key departments. As an example, the CEO noted that Marketing promoted a special training event for customers that, when the sales people were out in front of the customer, they knew nothing about the special event and therefore could not talk to it with the customer. This irritated the head of sales who felt that his team looked incompetent in front of the client. Additionally, Operations was frequently pushing back on

Sales when they tried to schedule events for clients, saying they needed much more lead time than they had needed in the past. But yet, when Sales pushed for specifics, Operations told them it was on a case-by-case basis.

Much of this conflict, the CEO noted, was due to the fact that there have been significant changes to these groups since the organization's inception and there have been no changes made to accommodate growth within the organization. The CEO noted that in the early years of the company there were sales employees but no real marketing and operations staff. The sales people did the work that marketing and operations now perform, as well as their responsibilities for sales. As the company grew and specific resources were hired to develop a marketing department and an operations department, work was simply transferred from sales to the other two groups without much discussion nor thought as to impacts on the business. It worked fine in the early years but has become increasingly obvious to the leadership team that processes and procedures needed to be clarified, updated and created where necessary in order to enable for more effective coordination and collaboration between the groups.

Given the fact that his project was aligned to a number of strategic initiatives, the budget could be adjusted as needed, but the CEO encouraged Lisa to try to work within the budget provided. However, if she felt additional budget monies were needed, she would need to make a strong case to the executives to secure additional money for the project.

There were a number of other initiatives being launched. The only one that may impact the project was an initiative for marketing that was to develop and roll out a new marketing strategy to increase business globally in countries where the organization was not doing much business now. However, the CEO felt that the marketing head was well aware of the importance of this process improvement initiative and therefore would be able to effectively commit resources to both initiatives. Lisa, however, made a mental note to spend a bit more time with marketing to ensure she got what she needed from them for the success of this project. After all, resources were tight in the organization and simply because the head of marketing saw the need to be involved in both initiatives equally didn't mean the staff did!

The CEO suggested that Lisa reach out to marketing who conducted the customer satisfaction survey to get the most recent results from them. They would also be able to share year-over-year results as a customer satisfaction survey was conducted annually.

As for revenue and profitability, the CEO asked Lisa not to focus in those areas right now. He wanted to check in with the Board at the next meeting to discuss further.

Based on her conversation with the CEO, Lisa developed a Project Scope Statement (Exhibit 2) to share with the team.

Project Name: Process Improvement Initiative: Sales, Marketing, Operations		
Project ID: ACT-BPI-SMO		
Date: July 20xx		
Project Sponsor: Donald Jackson		
Project Manager: Lisa Smith-Rusch		
Project Justification		
Formalize processes, procedures and controls within 3 key business units – Sales, Marketing, Operations – in order to:		
<ul style="list-style-type: none"> • More effectively support a growing customer base • Compete more effectively in an increasingly competitive environment • Increase customer satisfaction • Increase retention of current customer base • Improve collaboration between sales, marketing, operations • Increase revenue and profitability within the organization 		
Project Description and Deliverables		
Analyze current and develop new/refine processes and procedures within Sales, Marketing and Operations; working collaboratively with key stakeholders in all 3 business units.		
Project Constraints		
<ul style="list-style-type: none"> • May not get sufficient support from stakeholders in Sales, Marketing and Operations which is required to document current processes and develop new/refine processes. Insufficient support in attending meetings/interviews and responding to surveys will create significant delays. • Project timeline may be an issue if stakeholder commitment not obtained. 		
Project Assumptions		
<ul style="list-style-type: none"> • Budget range is sufficient for BPI project • Departments (sales, marketing, operations, others as needed) will provide individuals to participate on project team • Contractor resources will be easily sourced. • No other major initiatives are being undertaken at the same time as this initiative 		
Developed by:	Lisa Smith-Rusch	Date: July 20xx
Approved by:	Donald Jackson	Date: July 20xx

Exhibit 2

Additionally, a high level budget was created (Exhibit 3) as well as a Risk Management Plan (Exhibit 4) and preliminary risk list (Exhibit 5).

Project Name: Process Improvement Initiative: Sales, Marketing, Operations	
Project ID: ACT-BPI-SMO	
Project Sponsor	
Name: Donald Jackson	
Project Manager	
Name: Lisa Smith-Rusch	
Preliminary Project Expenditures - Budget Provided by Leadership: \$200,000 - \$300,000	
Expenditure Type	Estimated Maximum Cost (\$)
Contractor services	95,000
Surveys (development of survey, support to compile responses)	5,000
Interviews of stakeholders (includes travel to sites for interviews, room rentals when needed for off-site meetings)	9,500
Team off-site meetings (once a month off-site at headquarters; includes travel to location, T&E)	50,000
Stakeholder meetings (via virtual platform monthly, in person at key sites quarterly, F&B for meetings)	20,000
Pilot group meetings	10,000
Risk reserve	15,000
Total of estimated expenditures to date	\$204,500
Comments: Other expenditures are expected but unknown at this time. Expect budget to be finalized during project planning. It is expected that the team can work with the budget cap provided of \$300,000.	

Exhibit 3

Risk Management Approach	Risks will be determined through: <ul style="list-style-type: none"> • Subject matter expert expertise • Brainstorming • Charter and Scope Statement • Schedule and Budget • Past projects completed within organization • Key stakeholders involved in initiative 				
Roles and Responsibilities	Primary risk management/risk monitoring lies with the project manager				
Risk Categories	Categories to manage risks include: <ul style="list-style-type: none"> • People • Schedule • Stakeholders • Training 				
Probability and Impact Matrix Formula: Probability x Impact = Prioritization of Risk					
Project Impact Area	Numerical Scales				
	0.05 (very low)	0.10 (low)	0.20 (moderate)	0.40 (high)	0.80 (very high)
Cost	Insignificant cost increase	< 10% cost increase	10% - 20% cost increase	21% - 40% cost increase	> 40% cost increase
Time	Insignificant time increase	< 5% time increase	5% - 10% time increase	11% - 20% time increase	> 20% time increase
Scope	Scope decrease barely noticeable	Minor areas of scope affected	Major areas of scope affected	Scope reduction unacceptable to sponsor	Project deliverable is effectively useless
Quality	Quality degradation barely noticeable	Only very demanding applications are affected	Quality reduction requires sponsor approval	Quality reduction unacceptable to sponsor	Project deliverable is effectively useless
Risk Evaluation	Risks will be evaluated at each team meeting, with the risk register being updated as required.				
Risk Reserve	\$15,000				
Prepared by	Lisa Smith-Rusch			Date: August, 20xx	

Exhibit 4

Project Name: Process Improvement Initiative: Sales, Marketing, Operations	
Project ID: ACT-BPI-SMO	
Project Sponsor	
Name: Donald Jackson	
Project Manager	
Name: Lisa Smith-Rusch	
Preliminary Risk Identification	
Risk Identified	Risk Category
Ability to get sufficient support from key stakeholders from Sales, Marketing and Operations in this initiative	People
Potential timeline issues if stakeholder engagement is difficult to obtain/retain	Schedule
Securing team members – limited resources due to other projects in progress within organization	People
Comments: Initial identification of risks identified from the following: <ul style="list-style-type: none"> • Charter and Scope Statement • Schedule and Budget • Past projects completed within organization • Key stakeholders involved in initiative <p>NOTE: this is a preliminary, first draft version of potential project risks.</p>	

Exhibit 5

Certainly the preliminary risk list would be developed further and would be monitored throughout the BPI project lifecycle. In fact, Lisa expected that new risks would certainly arise as the project really got underway and they started diving into how to change and fine-tune processes.

Chapter 3

Getting the Team Together

Lisa had the authority to select team members for the project. She had a few co-workers in mind for the project. She had worked with a number of them on previous projects and knew they would do a great job on this project. More importantly, however, she believed her choices represented a diverse mix in the organization and therefore would enable for a more successful project implementation. Her ideal team consisted of:

Team Member	Department Affiliation
Dana Jackson	Sales
Paul Fisher	Sales
George West	Marketing
Elizabeth Smith	External Communications/PR
Tammy Rouseau	Operations
Janice Haven	Operations
John Bachman	IT
Alexis McCane	IT

She chose individuals who had worked with the company for a number of years, as well as individuals who had worked with the company for 2 years or less. For example, Dana Jackson had been working with the company since its inception, but Paul Fisher had only started 6 months ago. She also chose individuals who represented all departments initially impacted as she knew it was important to get the buy-in and commitment of the impacted departments if this project was going to be a success. Her choices were approved by the Sponsor and each department head also gave the “go ahead” to have their employees involved in the project.

The Team Kick Off Meeting

The first team meeting was going to be a full day meeting to kick off the project and enable the team members to spend some time getting to know each other. In addition to the team members, the sponsor would attend to kick off the meeting, talking about the project and its value to the organization. He was bringing along with him the department heads. This would show their support for the project which was key given how much had to be accomplished for the project to be a success.

Lisa wanted to accomplish the following goals during the meeting:

- Review and finalize the project scope statement
- Develop the Work Breakdown Structure (WBS) and preliminary high-level schedule
- Determine roles and responsibilities on the team
- Determine processes for solving problems, resolving conflicts and making decisions
- Determine how the team will communicate and share information
- Determine a schedule for future team meetings

Additionally, Lisa wanted to spend some time on a few team building activities to help the team members get to know each other.

Prior to the meeting, Lisa reached out to each individual team member to introduce herself and learn more about them. She sent the team members a survey that included the questions shown in Exhibit 6. The purpose of the survey was to gather a few personal data points about each member that could be used to develop an activity that would enable each team member to get to know each other on a personal level. Lisa asked one of her colleagues, not working on this project, to coordinate the responses. This way she could also participate in the activity.

Thank you for participating on the project team! During our upcoming kickoff meeting, we will be conducting an activity that will enable us to build relationships and learn a bit about each other utilizing a number of conversation starters. As part of this activity, please complete the following survey that asks a variety of questions about your background, hobbies and interests. If you prefer not to answer a question, simply leave it blank. The survey should take no more than 3 - 5 minutes to complete.

Thank you for your participation!

Questions:

1. In which state or country were you born?
2. What is the most interesting place you ever went for vacation?
3. Where did you go on your last vacation?
4. What would be your ideal vacation?
5. What kinds of pets do you own (dog, cat, snake, bird, etc.) and how many of each?
6. What is your favorite hobby?
7. If you play a sport regularly, what sport?
8. What is the most daring thing you have ever done?
9. Do you have children, and if so – how many?
10. If you didn't have to work, what would you do?
11. If you had an extra \$1,000, what would you do with it?
12. If you won the lottery (over \$1 million) what would you do?
13. If you could have lunch with anyone in the world – dead or alive – who would you want to have lunch with?
14. What is your favorite movie?
15. What is your favorite book?
16. What is the one word or phrase that you believe best describes you?

Exhibit 6

Exhibit 7 shows the agenda that Lisa developed for the team kick off meeting. She had much to accomplish in just one day!

Date of meeting: August xx, 20xx

Meeting time: 8:00 AM – 9:00 PM

Meeting participants

Sponsor: Donald Jackson, CEO

Core project team members:

Project Manager: Lisa Smith-Rusch

- Dana Jackson
- Paul Fisher
- George West
- Elizabeth Smith
- Tammy Rouseau
- Janice Haven
- John Bachman
- Alexis McCane

Meeting Agenda

TIME	DESCRIPTION	KEY LEAD(S)
Morning		
8:00 – 9:00	Breakfast, introductions, team activity introduction	Project Manager, Project Sponsor
9:00 – 9:30	Review Project Charter, review high level budget, discuss goals and objectives of project	Project Sponsor, Project Manager
9:30 – 10:00	Review Project Scope Statement and finalize	Project Manager, Team Members
10:00 – 10:30	Break and time to work on team activity	Team Members, Project Manager
10:30 – Noon	Develop: WBS, preliminary schedule, roles and responsibilities of team members	Project Manager, Team Members
Afternoon/Evening		
Noon – 1:00	Lunch and continue to work on team activity	Project Manager, Team Members
1:00 – 1:30	Team building activity	Project Manager, Team Members
1:30 – 4:00	Develop key processes and procedures: problem solving, managing team conflicts, making decision, communication among team members Develop schedule for future team meetings	Project Manager, Team Members
4:00 – 4:30	Break	N/A
4:30 – 5:30	Wrap up of team activity	Project Manager, Team Members
5:30 – 6:30	Review of day’s accomplishment, Q&A	Project Manager, Team Members
6:30 – 7:00	Networking time	Project Manager, Team Members
7:00 – 9:00	Dinner	Project Sponsor, Project Manager, Team Members

Exhibit 7

The day of the team kick off meeting, the project sponsor moved around the room introducing himself to the team and thanking everyone for the work they were about to do on the project. When the meeting officially started at 8 AM it was apparent to the project manager that this was going to be a great team to lead! Everyone seemed engaged already – participating in the team activity by asking questions to get to know each other.

During the meeting, the following was accomplished:

- The preliminary project schedule was developed (see Exhibit 8) detailing the main tasks to be completed for the BPI project. This schedule would be finalized later on during another team meeting.
- Processes and procedures were developed to manage conflicts that arise on the team, solve problems and make decisions among team members.
- A preliminary basic communication plan for communicating between and among team members was developed. (Exhibit 9)

1. Project team kick-off (completed)
2. Initial Documentation
 - 2.1. Develop Project Charter
 - 2.2. Develop Project Scope Statement (preliminary)
 - 2.3. Develop Project Budget (preliminary)
3. Identify/select project team (completed)
4. Team kick-off meeting
5. Project Documentation
 - 5.1.1. Finalize Project Scope
 - 5.1.2. Develop high level schedule
 - 5.1.3. Preliminary Risk Identification
6. Identify key stakeholders
7. Communications planning
8. Initial stakeholder meeting
9. Data gathering to evaluate current processes
10. Document current processes
11. Develop “could be” processes
12. Develop “to be” processes
13. Training
14. Pilot group
15. Roll out final processes
16. Lessons learned
17. Evaluate

Who	What	When	How	Format
BPI Project Team Members	Progress reporting on completion of tasks to be accomplished	Weekly – on Friday mornings	Via sharing of team member status report worksheets	Each team member reports on progress of tasks completed as well as expectations for staying on schedule – 10 minutes per team member
	Team collaboration	Ongoing	Via project portal	Portal to be used to share information, trouble problems, and regularly communicate among team members
	Sub-team meetings (assumption: sub-teams to be used at some point during the project)	To be determined	Via face-to-face meetings, virtual meeting platform or conference call	Sub-team meetings will be scheduled on a weekly or bi-weekly basis depending on the sub-team. Sub-team meetings will be no longer than 45 minutes in length.
	Ad hoc meetings – problem solving, conflict resolution	To be determined	Via face-to-face or virtual meeting platform	As needed, the team will meet to resolve problems and/or conflicts that arise. These meetings will ideally be face-to-face but can move to a virtual environment if needed.

Exhibit 8

Exhibit 9

Roles and responsibilities (Exhibit 10) were assigned on the team with the team initially working as one core group.

Tasks	Team Members							
	Dana	Paul	George	Elizabeth	Tammy	Janice	John	Alexis
9.0 data gathering	R*	C	R*	C	R*	C	C	R*
10.0 document current processes*	R*	C	R*	C	R*	C	C	R*
11.0 develop "could be" processes	C	A	C	A	C	R	A	C
12.0 develop "to be" processes	A	A	A	A	A	R	A	A
13.0 training	R	C	C	C	C	C	A	C
14.0 pilot group	C	C	C	R	C	C	C	A

Key for table:

- R = responsible
- A = assist
- C = consult
- I = inform

*Lead individuals from each department to work with colleagues within department to gather data (9.0) and to document current processes (10.0). Lead individuals (R) will meet after documenting of current processes to review as a team and map out common processes/overlap.

Exhibit 10

It was expected that sub-teams would need to be developed later on in the project and certainly the initial responsibility and assignment matrix (RAM) would be developed further later on. At this point, Lisa simply wanted to ensure various team members had responsibility for the key components of the project depending on their skills and experiences.

In collaboration with the project team, the high-level schedule (Exhibit 11) was developed further, with milestones included.

ID	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1		Project kick-off	0 days	Mon 8/4/14	Mon 8/4/14		
2		Development: preliminary project documentation	20 days	Mon 8/4/14	Fri 8/29/14		
3		Charter	5 days	Mon 8/4/14	Fri 8/8/14	1	
4		Scope	10 days	Mon 8/11/14	Fri 8/22/14	3	
5		Budget	5 days	Mon 8/25/14	Fri 8/29/14	4	
6		Identify/select project team	6 days	Mon 8/25/14	Mon 9/1/14		
7		Select Project Team Members	4 days	Mon 8/25/14	Thu 8/28/14	4	
8		Develop RAM	2 days	Fri 8/29/14	Mon 9/1/14	7	
9		Team kick-off meeting	1 day	Tue 9/2/14	Tue 9/2/14	8	
10		Project Documnetation	12 days	Wed 9/3/14	Thu 9/18/14		
11		Finalize Project Scope	2 days	Wed 9/3/14	Thu 9/4/14	9	
12		Develop high level schedule	5 days	Fri 9/5/14	Thu 9/11/14	11	
13		Risk Identification	3 days	Fri 9/12/14	Tue 9/16/14	12	
14		Finalize Budget	2 days	Wed 9/17/14	Thu 9/18/14	13	
15		Identify key stakeholders	1 day	Mon 8/11/14	Mon 8/11/14	3	
16		Communications planning	1 day	Wed 9/3/14	Wed 9/3/14	9	
17		Initial stakeholder meeting	1 day	Mon 9/1/14	Mon 9/1/14	5	
18		Project Planning Complete	0 days	Thu 9/18/14	Thu 9/18/14	14,16,17,15	
19		Data gathering to evaluate current processes	10 days	Fri 9/19/14	Thu 10/2/14		
20		Document current processes for sales	10 days	Fri 9/19/14	Thu 10/2/14	18	
21		Document current processes for marketing	5 days	Fri 9/19/14	Thu 9/25/14	18	
22		Document current processes for operations	6 days	Fri 9/19/14	Fri 9/26/14	18	
23		Current processes evaluation Complete	0 days	Thu 10/2/14	Thu 10/2/14	20,21,22	
24		Develop "could be" processes	1 day	Fri 10/3/14	Fri 10/3/14	23	
25		Develop "to be" processes	1 day	Mon 10/6/14	Mon 10/6/14	24	
26		Training	1 day	Tue 10/7/14	Tue 10/7/14	25	
27		Pilot group	1 day	Wed 10/8/14	Wed 10/8/14	25,26	
28		Roll out final processes	1 day	Thu 10/9/14	Thu 10/9/14	27	
29		Lessons learned	1 day	Fri 10/10/14	Fri 10/10/14	28	
30		Evaluate	1 day	Mon 10/13/14	Mon 10/13/14	28,29	

Exhibit 11

This is still, however, not a complete, detailed schedule but rather provides a starting point for the reader in the development of the schedule for the project.

Chapter 4

The First Stakeholder Meeting

The first stakeholder meeting was held and key stakeholders from all three impacted departments attended. At a high level, Lisa shared the project goals and objectives and the high level timeline for completion. She also talked about the benefits of the project for individuals. She noted that the project would enable employees to better support a growing client base and enable for improved collaboration between the departments. Improved collaboration would enable for increased revenue and profitability and reduce the rework that often occurs

because the departments are not always in sync. The sponsor discussed the project from the perspective of the value to the organization.

There were a number of questions around training and how the new processes would be tested. Lisa told them that training would certainly be provided and a pilot group with members representing all three departments would be created to test processes before full roll out of the process.

Lisa shared a high level communication plan with the stakeholders for communications during Phase 1 of the

Project Phase	Who	What	When	How	Format
Pre-Project	All stakeholder groups	Initial stakeholder meeting – share general project information	August 20xx	Face-to-face meeting	During all staff meeting in August, time allocated to introduce project and answer initial questions: 60 minutes
Phase 1	Marketing stakeholders	Individual department meetings – discuss impact on specific department stakeholders, answer questions, provide more details of involvement by department stakeholders	September 20xx	Face-to-face meeting	1 hour allocated during Sept. marketing department meeting
	Sales stakeholders		September 20xx	Face-to-face meeting	1 hour allocated during Sept. sales department meeting
	Operations stakeholders		September 20xx	Face-to-face meeting	1 hour allocated during Sept. operations department meeting
	All stakeholders	Train in use of portal to find information about project and communicate with project team	September 20xx	Via virtual platform; reference sheet for using portal after training	30 minutes training via virtual platform
	All stakeholders	Provide high level schedule for BPI project for review	October 20xx	Via project portal, follow up face-to-face department meetings	Upload information to portal and send email to all stakeholders with information At dept. meetings – provide overview of schedule and answer questions/address concerns
	All stakeholders	Determine training needs	November 20xx	Use survey to determine training needs among different stakeholders group for development of training programs	Via survey link from project portal
All stakeholders	Q&A session	October 20xx – November 20xx	Various meetings and forums to ask questions, bring up concerns, etc.	30 minute meetings scheduled during various times throughout the day over a 3 – 4 week period (mornings, lunch, after hours)	

project. (Exhibit 12.)

Exhibit 12

She noted, however, that this was a preliminary communication plan and needed to be finalized in collaboration with the stakeholders. Lisa also shared that after the initial department meetings, the BPI project team would develop a more robust communication plan for each phase of the project.

During this meeting, Lisa also shared the high level steps, or phases, to be used for this project (Exhibit 13).

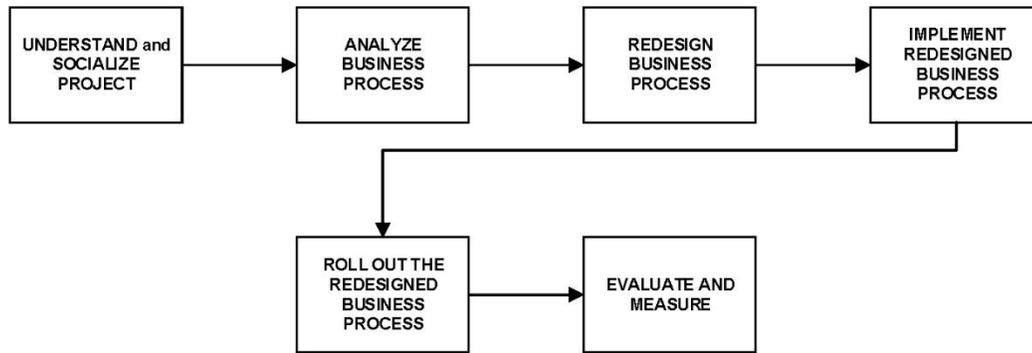


Exhibit 13

She let the stakeholders know that she would keep them apprised of project progress throughout the initiative.

Channels for Communication

Face-to-face meetings were preferred for communicating with the stakeholders. There were, however, stakeholders who were frequently on the road who would need to and would want to participate in stakeholder meetings. In addition to face-to-face meetings, virtual meetings would be held to accommodate those traveling. Additionally, the team decided the following channels would be used for various communications, depending on the type of communication and the stakeholder group:

- Emails
- Virtual meetings
- Face-to-face meetings
- Surveys

Additionally, the organization regularly used a Microsoft SharePoint® site for all projects that were launched in the organization and therefore the site would be used for this project. The site would provide access for project team members, the steering committee and the sponsor as well as all stakeholders (employees).

Chapter 5

A Review of the Current Processes

Focus group meetings were scheduled with all key stakeholders from each of the departments in which processes were being evaluated. In addition to meetings, a number of one-on-one interviews as well as surveys were used to gather additional data about current processes.

The Challenges

After evaluating the processes and procedures in place within Sales, Marketing and Operations, it was discovered that:

- Each sales person had their own method of engaging with clients.
- Information is not shared among sales people nor with Marketing and Operations.
- There are no formal, documented processes or procedures in place and no one location where client information can be found.
- Reporting on the sales pipeline and on status of engagements with clients is sporadic at best.
- Marketing often complains that they cannot effectively support Sales if they have no idea what their needs are or the needs of clients, or even who are all the clients of the company.
- Operations has difficulty engaging with trainers to support client training needs when they are not apprised of status of proposals with clients nor of upcoming training needs. Often they hear of needs only a few weeks before an engagement is set to start at the client site, increasing the costs of securing and providing trainers.
- Operations notes that Sales finalizes contracts without consideration of costs on the Operations side, thereby causing a reduction in potential profitability in engagements. In fact, three of the last ten engagements were unprofitable for All Company Training.

From this point on in the case study, the focus will be on one particular Sales' process only although the project also looked at a number of processes within Sales, Marketing and Operations.

Exhibit 14 is the current process documented based on focus groups, surveys and one-on-one meetings with key stakeholders.

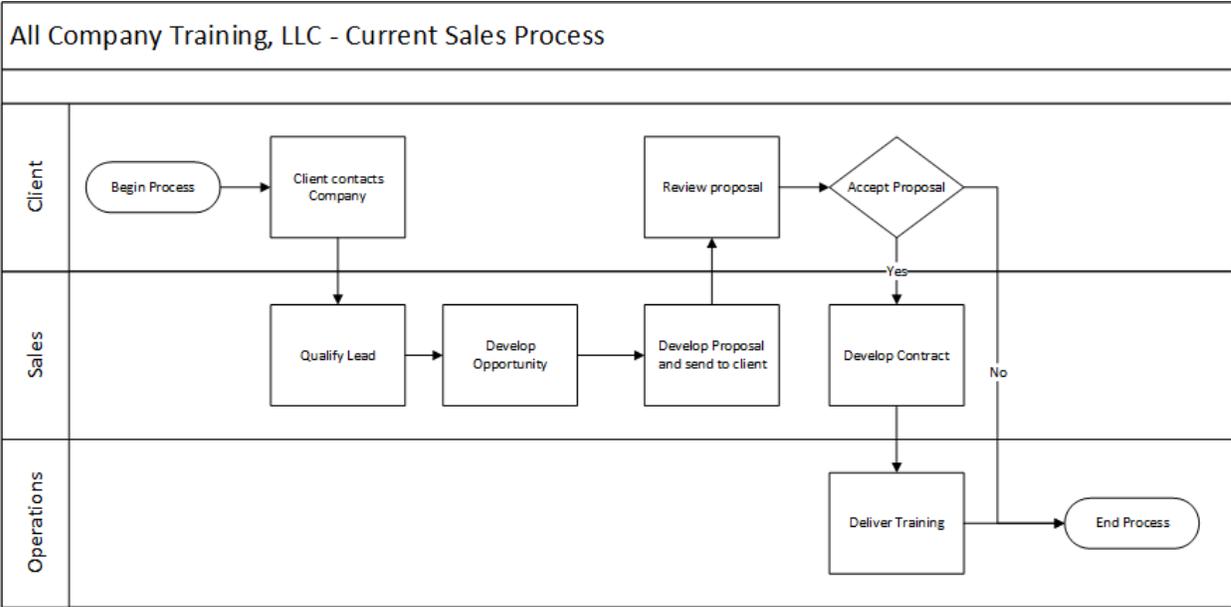


Exhibit 14

As can be seen in Exhibit 14, Operations is not involved in the client engagement until *after* the contract has been developed and Marketing does not even appear in the process. An analysis of this current process determined a number of issues that were impacting the client experience as well as sharing of information between key departments within the organization.

Project: Improvement in Processes – Current Sales Process			
Problem Detected	Example of Problem	Impact	Success Measurement
Insufficient involvement by operations early on in client engagement	Training does not meet client needs or is not delivered in a suitable timeframe for the client.	H	Operations engaged earlier on in client discussions to enable for a better understanding of client needs.
Marketing not in loop	Marketing is not in the current sales process.	H	Marketing involvement in the sales process to promote regular knowledge transfer between sales and marketing to enable for better engagement and understanding of customers.

Exhibit 15

Exhibit 15 focuses on just two main issues discussed in this phase of the project.

Chapter 6

The “Could Be” Process

It was time to consider how the process might look. The criteria required for a redesign of this Sales process included:

- Improved sharing of knowledge between Sales, Marketing and Operations
- Earlier involvement of operations in the client engagement
- Improved customer service

This would enable for:

- Increased satisfaction of customers overall
- Better meeting the needs of the customer as it relates to training requirements
- Increased revenue and profitability (repeat customers, ensuring each client engagement is profitable)
- Increased collaboration between Sales, Marketing and Operations

This criteria was used to develop a “could be” process for the project. The process mapping workshop was held off-site to avoid interruptions and four hours was set aside for an initial meeting for this process redesign. Additional meetings would be held if necessary. This workshop included key stakeholders from all three departments.

Exhibit 16 shows the “could be” process developed during the workshop.

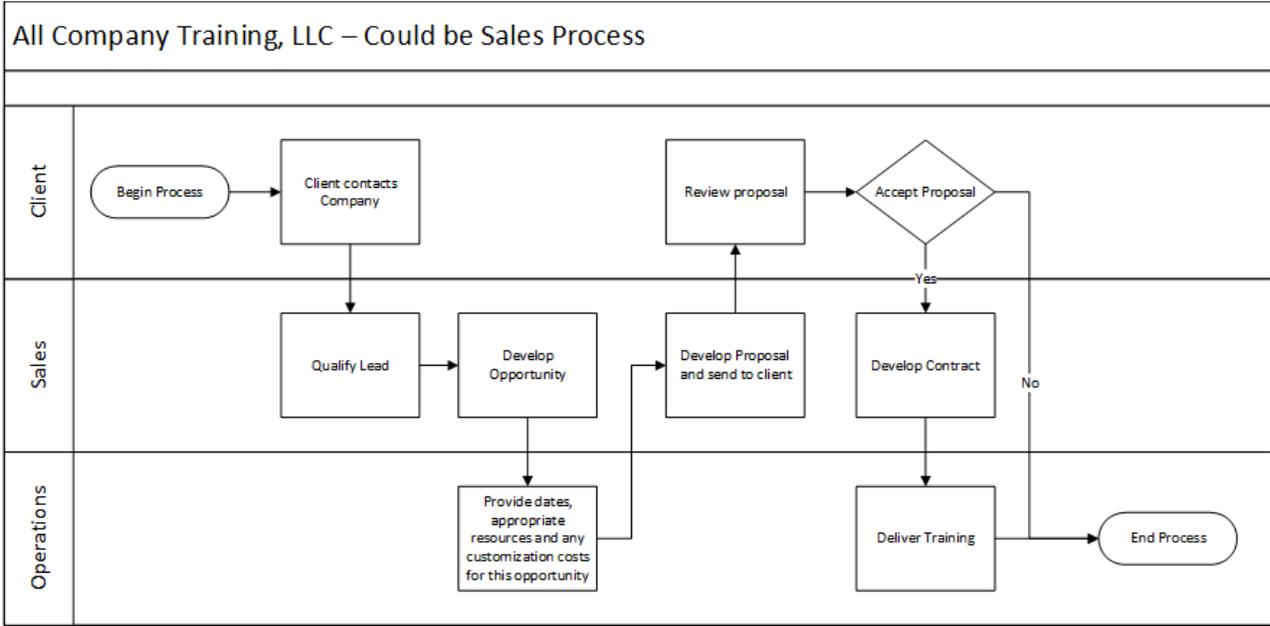


Exhibit 16

Once the “could be” process was developed and agreed to by the key stakeholders who attended the workshop, it was sent to the sponsor and other key stakeholders for review and input into the design.

The “To Be” Process

During a review of the “could be” process, the sponsor and a number of others noted that marketing was not directly involved in the process but certainly needed to be.

The “could be” process went back to the individuals involved in the redesign workshop and marketing was added to the flow, as can be seen in Exhibit 17.

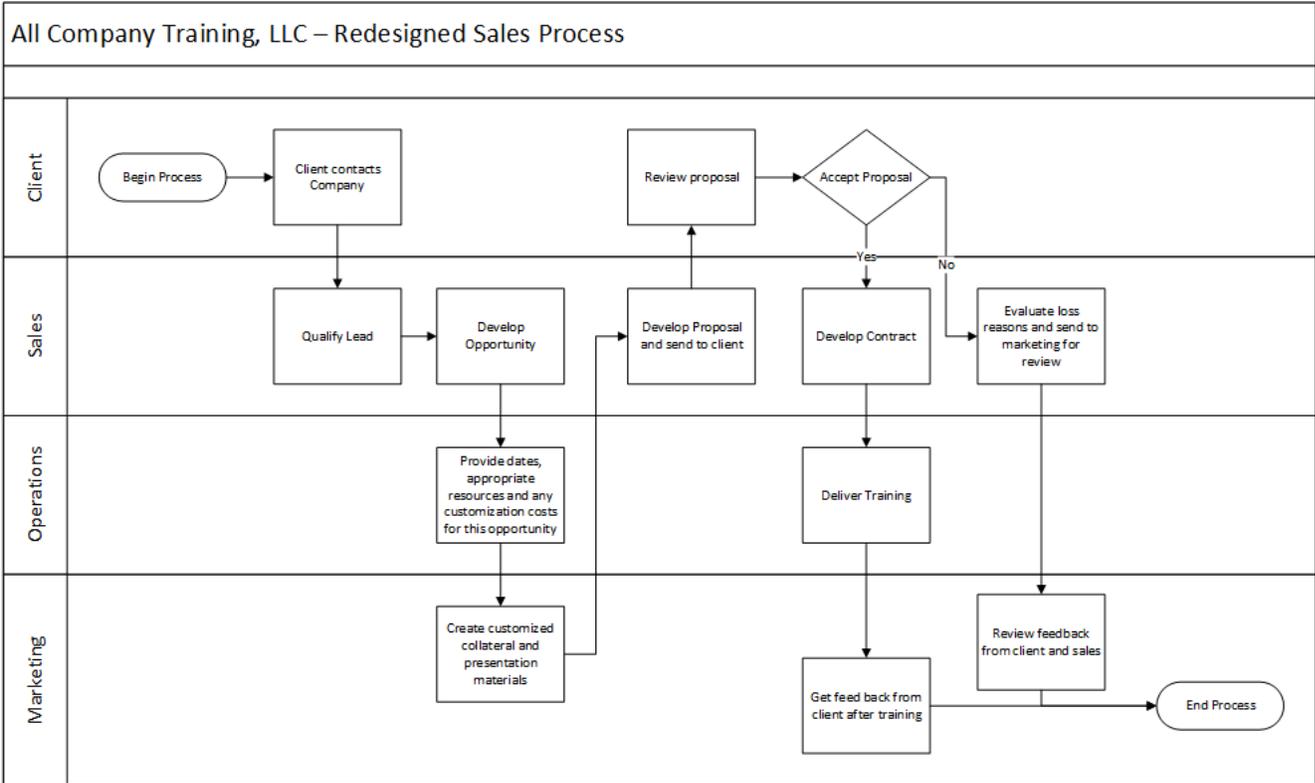


Exhibit 17

Marketing now had a bigger and more prominent role in client engagements. They would assist in creating the collateral and presentation materials customized to the specific opportunity to ensure a better chance of closing the contract. They were also involved at the end to evaluate how the client perceives All Company Training which would enable for better engagement of all clients overall and focused and improved marketing efforts.

Chapter 7

The Pilot Group

The proposed “to be” process was rolled out to the pilot group to test. There was a current client that had recently reached out to the company for additional training. This was considered a perfect scenario to test out the new process. The company had a good relationship with this client and the client knew that changes were being made to engage more individuals in the sales process. The client agreed to be a test of the process and was willing to provide feedback.

Prior to roll out, the pilot group “walked” through the new process. It appeared to be working fine during the walk-through, but the true test would be when it was applied in actual engagement with the client.

The Process in Action

Meetings were set up on a bi-weekly basis to “check in” on how effectively the new process was working.

These meetings were with the pilot group. A final review meeting would include the client. Feedback about the process was also gathered via the project SharePoint® site.

About half-way through the process, one of the sales people who was in the pilot group noted that the turnaround time to get information back to the client was slowed down with the new process. In particular, Operations was taking too long to get information for the proposal. Sales felt that Operations was not sensitive to the fact that client proposals had to be turned around quickly. Certainly in this case the client understood (since they were a long-time client), but with a new client this would be a problem.

In a follow up meeting with the entire pilot group it was decided to refine the process to include turnaround time for responses to the client. A change request form (Exhibit 18) was completed by the pilot group to refine the “to be” process.

Exhibit 18

The	Project Manager: Lisa Smith-Rusch	Stakeholder Requesting Change: Abigail Jones – Sales Lead
	Description of Change to “To Be” Process Include turnaround time constraints for providing data for client proposal.	
	Reason for Change to Process (be specific in explanation) Quick turnaround is expected from clients in ensuring timely submission of proposals, particularly in competitive situations.	
	Impact on Process if Change Does Not Occur/Is Not Approved May impact submission of proposals to clients in a timely manner and may cause loss of a potential sale if deadline is missed.	
	Decision Made (Approve, Reject) APPROVED	
	Justification for Decision Change approved in order to ensure effective response to client.	
	Approved by: Donald Jackson (sponsor)	Date: xx/xx/xxxx

requested change was accepted by the sponsor and other key stakeholders and the process was refined. Exhibit 19 shows the refined process.

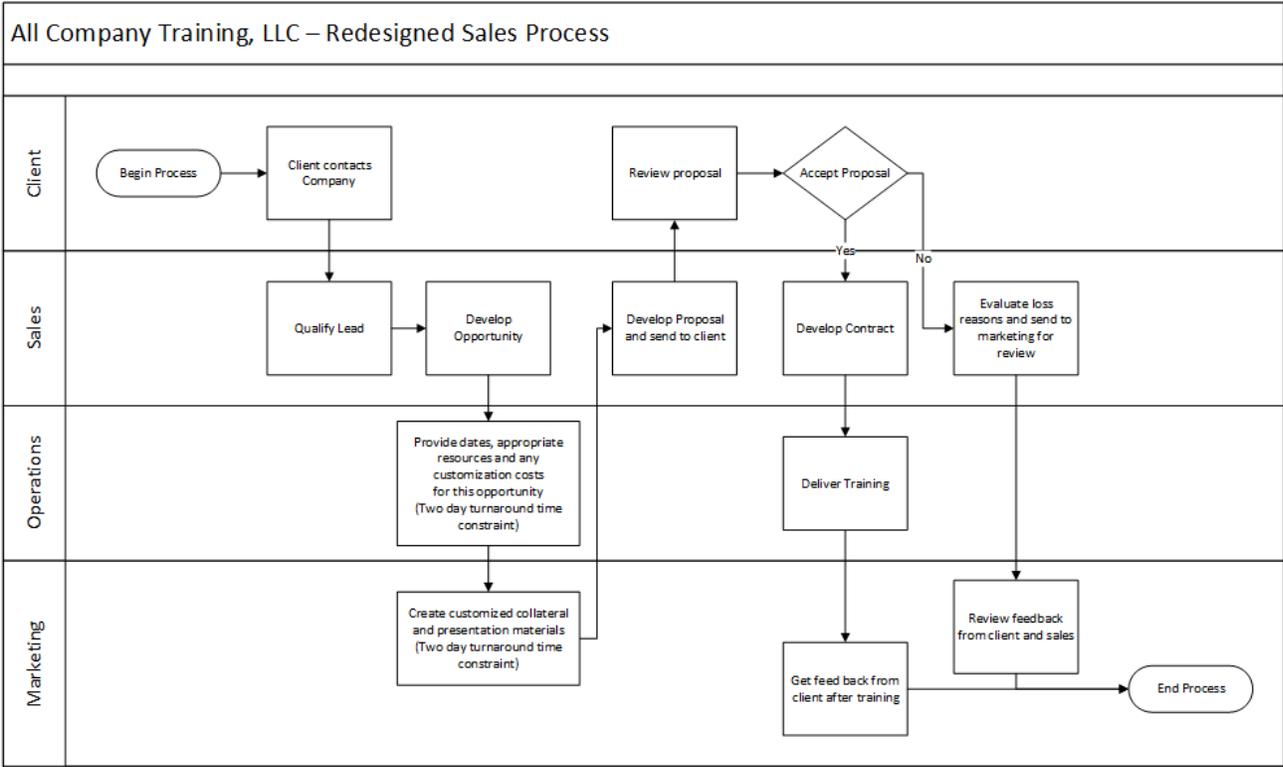


Exhibit 19

Chapter 8

Training Organization-Wide: A Focus on Sales, Operations and Marketing

A training plan, developed earlier in the project, was ready to be implemented. Training was scheduled for each key department (Sales, Operations and Marketing) and was led, in part, by those individuals involved in the pilot group. The pilot group shared their use of the process for a client. Additionally, the pilot group was able to share the perspective of the client. This provided credibility for users as well as comfort about the process and how it would work as a key client of the organization felt the process made sense and enabled for better engagement with the client.

Some discussion during training ensued around the “two day turnaround time constraint” shown in Exhibit 19. There as concern that there may be times when two days was not practical. On the other hand, it was also noted there may be times when turnaround could be much quicker. It was shared that the intent of the time constraint was to ensure a quick response to a client but that exceptions would have to be noted and, more importantly, discussed to ensure everyone was in agreement. Any good process needed some flexibility built in.

The training involved running each department through the process individually by reviewing where they entered into the process and what was required when in the process. The groups then came together and worked through a simulation to walk through the process with a “client.” The process did not appear to need any further tweaks and the “to be” process was ready for roll-out organization wide.

Sharing of the launch of this refined process was planned for the entire organization. This would be done via a one hour lunch and learn session as well as via an email from the CEO, in the company newsletter and via the company portal. The goal here was to highlight a BPI project that was successfully launched and had gotten positive feedback from the client who was involved in the launch, as well as positive feedback from the departments who were most impacted by this component of the process change project.

Chapter 9

Evaluating Success of the BPI Project

After three months of using this particular process for current and new clients, Lisa and the project team reached out for feedback from Sales, Operations and Marketing. A two hour meeting was planned in order to check in on how the process was working. Everyone attended the meeting, including the sponsor of the project.

One issue which came up was the two-day turnaround time commitment noted in the process. It was shared by Sales that much of the time, except in very rare instances, Operations and Marketing provided information within a day. The CEO was pleased that Operations and Marketing were shortening the process by turning around information to clients sooner rather than later, but felt that as new employees joined the organization, it

was important to reiterate the importance of a rapid turnaround. And certainly, there would be situations when, given the amount of information required, two days may be required to respond. Therefore, keeping the information about the expected turnaround time in the process served as a reminder for new hires as well as everyone involved with the client.

The component of the process change project was considered a success. This was attributed to a diverse project team and commitment from leadership on changing the process.

Note: The client actually evaluated the success of the BPI project after all processes were refined/changed; however, for the purposes of this case study, we focused only on one process.

Continuing to Refine Processes

Moving forward, the All Company Training decided to evaluate key business processes annually in order to continue to refine how the work got done in the organization. A team was pulled together to review processes for improvement. The team would first look at processes within Operations, and then move to Marketing, Human Resources, Sales and then on to other areas. The goal of this continuous process review team was to bring together a diverse group of individuals from throughout the organization, representing all departments and all levels of employees, to regularly evaluate and refine how the work gets done.