

THE 3 Ms OF IMPLEMENTATION: PROJECT, CHANGE AND VENDOR MANAGEMENT

by LORI BOCKLUND

“To get the three Ms right, review each discipline’s processes and responsibilities with vendors during the requirements, selection and planning process so that expectations are clear.” p. 4



THE 3 Ms OF IMPLEMENTATION: PROJECT, CHANGE AND VENDOR MANAGEMENT

WITH GOOD PRACTICES AROUND THE 3 Ms, YOU CAN MOVE FASTER AND MORE EFFICIENTLY.

by Lori Bocklund, Strategic Contact

Three management factors play a key role in technology implementation success: Project, Change and Vendor Management. Project Management (PM) is typically the focus of formal practices and the associated resources and training. Change Management (CM) and Vendor Management (VM) are just as important. They should go hand-in-hand with PM to meet timelines, manage budgets and resources, AND deliver the (ongoing) outcomes and results expected.

Project Management Is Not Enough

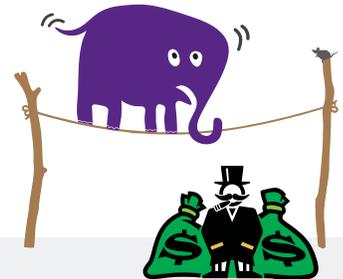
PM is a mature practice in most organizations. Many have a Program/Project Management Office (PMO) with good leadership and resource management for a variety of projects. The PMO assigns PMs, especially for capital projects, and provides standard practices for the organization. The PMO ensures project governance, with leadership and oversight of funds and resources, risk management and more.

Good PM requires Business Requirements Documents (BRD) at an early phase of the project (even before formal project approval), often with Return on Investment (ROI) and measurable business objectives. And it ensures a focus on the business needs regardless of whether IT or another department supplies the resources (certified or not—see sidebar).

PM resources and tools are great, but project success is not just about PM. You can have excellent scope management, task completion, budget management, resource management and cutover, and yet sow the seeds of failure. While the project team is cutting the celebratory cake, the users (frontline staff, supervisors/management, even customers) may not be onboard, and the vendor may be reassigning staff. Within days or weeks, the technology is underutilized (or ignored), and the knowledgeable vendor resources have moved on to their next project.

CM and VM are essential practices to ensure success in the full sense of the word. CM is about helping people adopt the process and technology changes the project presents, and institute practices that will ensure those changes keep delivering business value. Projects are not just about implementing the capital investment of hardware and software, or operational costs of cloud-based solutions. CM is about people who use that technology.

VM is about ensuring the vendor and internal project teams are aligned every step of the way, and the vendor's focus also remains on business success. And VM is critical for the inevitable bumps and changes that will occur as a project progresses. This description may sound fundamental, but it's often at odds with a vendor's goals to use only the resources allocated, march as quickly as possible to cutover, issue milestone invoices and/or start billing, and move the solution into produc-



LESSONS IN INVESTMENT AND BALANCE

HERE ARE SOME EXCELLENT EXAMPLES OF THE THREE Ms IN ACTION WHERE A LITTLE INVESTMENT GOES A LONG WAY:

- One ideal: People certified in both PM and CM with the rare but potent combination of skills and interests to help people achieve their potential and to manage tasks to completion. Prosci research and engagement shows an increasing focus on the combination of PM and CM, and we like that combo.
- Another example that is arguably essential but unfortunately not always the norm is solid project plans with all elements outlined, aligned with vendor plans, incorporating key CM activities. Whoever owns the plan invests the time to get it right for everyone.
- One of our favorite best practices is clients embracing CM. They make the investment (tools, training and/or outside resources) or already have resources to get them started. Ideally CM starts early, continues throughout the project and past cutover, and includes more than just communication and training.

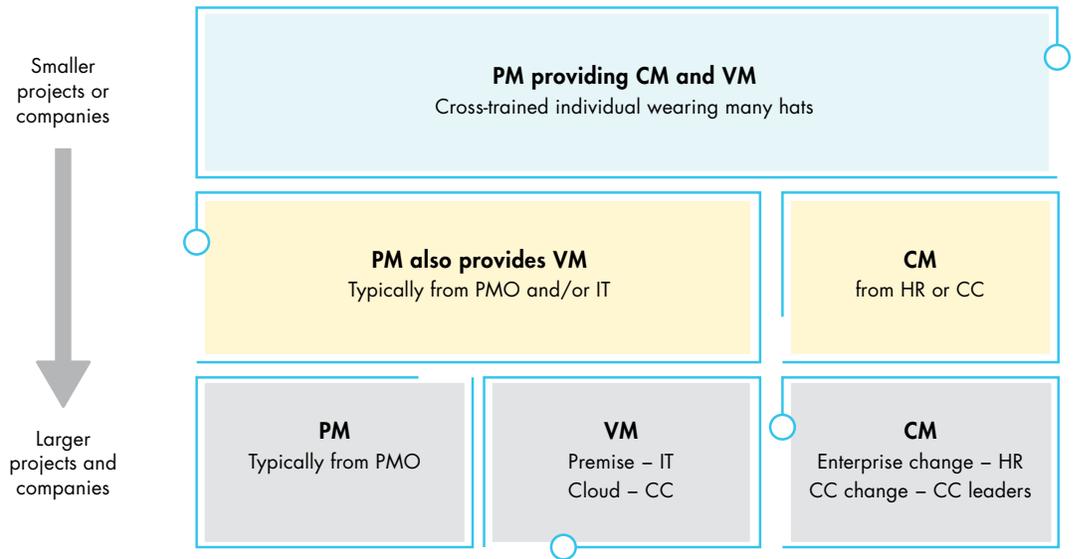


"BALANCE" ALSO PLAYS A KEY ROLE IN SUCCESS:

- Balance between controlling the vendor and trusting them to do their part, achieved when expectations are clear and they are held accountable.
- Balancing the need for updates and communication with the need to spend time getting tasks done, not sitting in meetings.
- Documenting routine status updates concisely without content that no one is going to read.
- Canceling regularly scheduled status meetings when unnecessary—e.g., things are generally good and issues can be address with emails or targeted communication.

FIGURE 1

TYPICAL MODELS FOR THE 3 Ms



tion status. The classic scenario is a vendor (or their partner providing the professional services) pushing for the ease and speed of implementing technology that matches the existing environment with no redesign.

Pursue All Three Ms

A perfect world ensures cohesive management across the three disciplines. We’ve seen several scenarios (see Figure 1). A PM may wear multiple hats and take responsibility for VM and CM. It is a rare individual who has the bandwidth and skill to do it all well. But when the right person is assigned, it can be great to have everything inherently managed together. Another scenario is when the PM handles VM and works closely with a CM resource. This model enables some specialization while requiring good collaboration. In a third model, the PM oversees tasks and an individual tied to the purchasing decision and/or ongoing vendor relations handles VM. If it’s a premise solution, the VM tends to be in IT. Cloud solutions increasingly place the VM in a business area such as the contact center. Again, collaboration is key.

VM requires managers managing managers (say that three times fast!) and direct, active engagement. Align your plan with the vendor’s plan, but don’t combine them. Recognize that you may need to point out gaps or concerns with the vendor’s plan. Typical examples are not enough time for testing or lead time on

network connectivity. Make sure that roles and responsibilities are clear, especially for things like third-party services (e.g., network connectivity). And keep in mind that the vendor won’t manage your IT during the project, or any third-party vendor relationship that you own.

CM typically comes from HR for enterprise-impacting projects such as a new CRM system that will be used by many departments. A contact center leader might handle CM for center-specific projects, often without the benefit of formal training. It can work well if change is limited and the leader invests sufficient time in the project. In the best of worlds, all persons who carry the CM mantle should also be equipped with training and tools (see sidebar on certification).

Hints and Tips

To get the three Ms right, review each discipline’s processes and responsibilities with vendors during the requirements, selection and planning process so that expectations are clear. This approach impacts the vendor’s professional services—resources, timelines, tasks, etc.—and should feed into their Statement of Work (SOW). Work with PMO, HR or other internal departments to define their needs and how they will fit in the overall plan. Use the available resources most effectively for the defined scope. And don’t forget, the internal PM must build CM- and VM-specific tasks into the project plan and oversee each.

THE DIFFERENT ROLES SUIT DIFFERENT PERSONALITIES AND STRENGTHS. THE PM TENDS TO BE LOGICAL, TASK-ORIENTED, AND CAN BE MORE TECHNOLOGY-ORIENTED. CM IS A PEOPLE-ORIENTED JOB. VM IS A COMBINATION OF THE TWO.



FOLLOW
Strategic Contact
on Twitter
(@StratContact)

(That's why it sometimes works for the PM to fill all roles, if it's the right person.)

The different roles suit different personalities and strengths. The PM tends to be logical, task-oriented, and can be more technology-oriented. CM is a people-oriented job. VM is a combination of the two, with a different twist on the people/communication side than CM: both get people to perform but with different drivers, carrots and sticks.

The PMO or other oversight group should define what constitutes a quality deliverable for each type of document—project plans, functional requirements, specifications, test plans, status reports, etc. VM includes SOW, SLAs and vendor project plans. CM includes the plans for communications, training, sponsorship, coaching, and resistance management based on the Prosci® model for change management (see www.change-management.com).

The 3 Ms Live Beyond Cutover

After the technology is in and working, you still need all three Ms. The PM may work on subsequent phases or new tasks related to the main project (and you will benefit immensely if it is the same PM, not a changing of the guard). You need VM to oversee performance and Service Level Agreements (SLAs), deliver new functionality, and keep everyone informed of new system capabilities or options. CM reinforces changes, makes sure that customers and staff (frontline and support) are using

technology effectively, and addresses adoption issues that can compromise results.

Leadership and Successful Management

In today's projects, everyone seems to want to move fast, but resources are limited and risks are high. With good practices around the three Ms, you can move faster and more efficiently.

An enterprise-wide mentality benefits all the Ms, with buy-in on consistent and effectively applied practices driven from above. We are thrilled when a CEO, COO or other high-level leader, or the PMO or governance committee, believes in all three elements and the importance of communication among all parties. They expect projects will be run accordingly, allocating the time, money and resources to do it right. Then the three Ms all fall into place. ☺



Lori Bocklund is Founder and President of Strategic Contact. (lori@strategiccontact.com)

HOW IMPORTANT ARE CERTIFICATIONS?

THOSE WHO TAKE A FORMAL APPROACH TO PM OFTEN SEEK CERTIFIED STAFF TO MANAGE PROJECTS—generally a Project Management Professional (PMP) certified by the Project Management Institute (PMI). PMP is a significant investment to ensure individuals learn and apply the best practices of managing projects.



THE MORE STRUCTURED THE ENVIRONMENT, THE MORE VALUE PM CERTIFICATION HAS.

In our experience, however, formality and structure works best when the principles are adapted to the environment. Sometimes everything is run by formal project plans and other documents, and in other situations, it is less rigid. Our hot button is to make sure that whatever documentation is used, it is not just about checking boxes.



PART OF THE PMP CERTIFICATION INCLUDES COMMUNICATION ACROSS THE TEAM (INTERNAL AND EXTERNAL), AND A GOOD PM WILL PRACTICE THAT DILIGENTLY.

Status reports should clearly and concisely keep everyone moving forward toward the same goals and hold people accountable to tasks and timelines. Effective communication supports a critical element of good CM and VM, as well. Non-certified PMs can be fine if they are trained in the basics, given good tools, processes and principles.



CM CERTIFICATION IS REALLY VALUABLE AND IMPORTANT IF THE COMPANY OR CENTER IS GOING TO MAKE CM A CENTRAL PART OF PROJECTS ONGOING.

CM certification is available through companies like Prosci, certifying practitioners in their methodology and tools. A relatively new organization to parallel the PMI, the Association of Change Management Professional (ACMP), is slated to launch its independent Certified Change Management Professional (CCMP) program in 2016.

CONNECT WITH PIPELINE



@SusanHash • @CCPipeline



youtube.com/ccPipeline



linkd.in/17M5rKM

About Contact Center Pipeline

Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

To learn more, visit: www.contactcenterpipeline.com



Download complete issues, articles, white papers, and more at <http://bit.ly/14bq01k>

PIPELINE PUBLISHING GROUP, INC. | PO Box 3467, Annapolis, MD 21403 • (443) 909-6951 • info@contactcenterpipeline.com

Copyright ©2015, Pipeline Publishing Group, Inc. *All rights reserved.*

Reproduction of Contact Center Pipeline in whole or in part is expressly prohibited without prior written permission from the publisher.