



Perfecting Project Management

By Drew Robb

HR Magazine

June 1, 2009

Perfecting Project Management: The right tools can keep your projects flowing and flag potential logjams.

When two companies with thousands of employees merge, it can be a challenge to get their many parts working together. That was the situation for two California companies, Invitrogen Corp. of Carlsbad and Applied Biosystems Inc. of Foster City, after they decided to combine their operations into Life Technologies Corp., a biotechnology tools company that has 10,000 employees, sells more than 50,000 products and operates in 110 countries.

Merging the HR systems of the two fell to Jen Frost, PHR, the merged company's global IT project manager for its human resource information system (HRIS). This required moving 5,000 Invitrogen employees from a legacy system to the SAP HRIS used by Applied Biosystems and upgrading the company's enterprise resource planning system.

"Whether it is an applicant tracking system, performance management, quarterly dialogue or any of the tools that are out there for HR, consolidating two equally sized 5,000-person companies demands a bridging of the systems," says Frost.

To pull it off, Life Technologies used two types of project management software- Serena Software Inc.'s Mariner to manage individual projects at a detailed level, and Microsoft Project to give a high-level view of the entire program.

"When you have 50 different things going on in a given week, you need these tools to see where we have assigned our resources and to make sure we are not creating any bottlenecks or inadvertent risks by setting up too many things going live on certain dates," says Frost.

Marking the Trend

Project management and its tools have long been used for capital projects and tracking software development. The U.S. Department of Agriculture's information technology staff, for example, has embraced project management, training more than 1,000 staff on its disciplines, with hundreds receiving Project Management Professional certification through the Project Management Institute. Tata Consultancy Services, an IT consultancy in Mumbai, India, uses home-grown project management software to track 15,000 deliverables every quarter. Human resource professionals, however, have been slower to adopt project management.

"Project management has had high adoption in construction and technology where the deliverables are very definite," says Kym Burke, a Tampa, Fla.-based principal in HR effectiveness for Mercer, a global HR consulting firm, and a certified project manager. Where the deliverables are less tangible, adopting project management principles becomes more difficult. "When you start talking about HR, which is primarily a service, it is hard to implement some of the standard project management protocols and methodologies into their environments," Burke continues.

Nevertheless, project and portfolio management (PPM) tools are increasingly being adopted by HR professionals, often as a result of adopting tools used by IT departments. Employers have a growing range of software to choose from. For smaller organizations or projects, there are desktop applications, including Microsoft Project, Intellisys Project, Project KickStart and RationPlan Multi Project, costing between \$100 and \$500, usually for a single-user license.

Enterprise applications, on the other hand, offer greater collaboration features and the ability to manage an entire project portfolio. These include CA Clarity, Hewlett-Packard Co.'s PPM, Oracle Corp.'s Primavera, and Serena Software's Mariner, as well as the server version of Microsoft Project. New additions to the market are vendors offering project management software as a service (SAAS), including Daptiv, PowerSteering and Sciforma's PSNext.

"Some of the SAAS vendors have built tools that are very well-suited to small projects, but they are not heavy on the planning side," says Margo Visitacion, vice president for application development and program management at Forrester Research Inc., a business and technology research company in Cambridge, Mass. "For organizations that are managing portfolios of projects where they will be measuring costs, project dependencies and impact of the overall portfolio, they should get on-site enterprise PPM systems."

Project Planning

Dartmouth College's Office of Human Resources started using Microsoft Project as a stand-alone tool several years ago. Cheryl Josler, PHR, Dartmouth's director of shared services, HRIS and payroll, attended a class on project management that used Microsoft Project and decided to purchase it for her own use.

"There are two different realms: clearly defined and identified projects that have one-time start and end points, and then there are the cyclical or annual processes to manage using project plans," says Josler. "We have both types of projects and use Microsoft Project for both."

An example of the first category is an ongoing project sparked by a change in the reporting of race and ethnicity. This coming fall, the Integrated Postsecondary Education Data System, part of the U.S. Department of Education's National Center for Education Statistics, is requiring new formats for monitoring staff and faculty diversity. Josler is using Microsoft Project to map how the college is going to change its data collection and reporting programs to meet the requirements. Josler considered getting a server version program, but she found it wasn't necessary, given the number of projects that needed to be run.

"I may have five or 10 projects in a year where there are relative dependencies between the projects," Josler explains. "I looked at using a server option to link all those projects together for program management but found the overhead was too high-it would take more time than it was worth."

Instead, she bought just the program on a disk and installed it on her desktop. She manually creates a program in project format that rolls up the targets from the individual small targets to keep them coordinated.

Dartmouth conducted general basic training for all HR managers on project management so they understood the processes, but they did not all receive training on the software. Two others in the department- the chief HR officer and Josler's assistant-also use Microsoft Project to manage HR's overall resources.

"The directors are asked quarterly to review their projects and make sure that what is in the central project plan is up-to-date as far as what resources are involved and what are the timelines," says Josler. "It allows us to easily see whether we have our resources applied to the right tasks at the right time."

As a manager of a team of four staffers working on the HRIS, she uses Microsoft Project every year to map the projects each team member is working on that year, making sure that employees have enough time allocated for the projects to be successful. Josler says the tool also helps her gain agreement from leadership on priorities-especially important when budgets are tight and fewer resources are available.

"I have the transparency to show the projects I am trying to accomplish and ask for leadership to clarify for me what projects are priority," Josler says. "Through this process, they can see what actions might not get done in the timelines they were thinking of because they are making the choices about the priorities and how we are applying the resources."

Merging Courses

While Dartmouth chose a stand-alone product, merging Life Technologies' HR functions required enterprise-level project management tools to coordinate actions at the two U.S. headquarters, as well as the overseas offices. The HR department was already using Microsoft Project, and the IT department was using Mariner. Each took on a role in executing the merger. The larger, multimillion-dollar projects that required assistance from IT were managed through Mariner.

"There is actually an approval system in there," says Frost. "If I need to assign certain heads to a project, I put a request through Mariner, and their managers approve or disapprove that assignment based on the time I need that person for."

Frost says Mariner was also useful in making sure there was no overlap in resource assignments. She was managing the SAP HRIS integration project while another employee was responsible for the simultaneous upgrade to that core HRIS application. The two were able to overlay their schedules, and Mariner would flag resource conflicts. "We were able to see where I had a resource dedicated 100 percent and she also had him dedicated 100 percent," Frost says. "It really helped us to balance the work and realign our key dates so that both projects were completed successfully."

Mariner also includes a feature that assists with assigning priorities. Users can fill out a basic questionnaire that looks at the long-term plan, the expected return on investment and the impact of not doing the project, and then assigns the project a rank.

Microsoft Project was used as the overall project portfolio manager, giving a high-level view of the schedule. Managers could use it to track ongoing major projects, the key resources working on those projects and the number of deliverables they had to meet that week.

"For example, we might have a conversion of payroll hitting at the same time we are doing ITPs [individual transition plans] and at the same time we are planning on doing a site closure," says Frost. "Seeing the overview helps us rebalance and reprioritize."

Since Invitrogen and Applied Biosystems had their own computer networks, Life Technologies created an internal site based on Confluence, enterprise wiki software from Sydney, Australia-based provider Atlassian Pty Ltd., as a central communication point for projects operated by the two.

"We were able to leverage that globally for use by 10,000 people," Frost says. "We would not have had nearly the result we achieved without it."

Systems Integration

Life Technologies and Dartmouth use PPM software for stand-alone applications, but the functions can operate as part of a broader collaboration environment. There is much stronger integration than previously between these tools and other enterprise systems such as e-mail, calendars and Microsoft SharePoint.

Ina Fliegen, director of human resources for Berlin Atlantic Capital AG, an international investment house headquartered in Berlin, Germany, uses Danish provider MatchWare A/S's OpenMind (now MindView) brainstorming and project planning software. "The tool structures thinking and is a playful way to approach serious issues in all kinds of status: brainstorming, opening, planning, detailing and finishing," says Fliegen. "Changes and additions are easy."

MindView integrates with Microsoft Office applications, including importing and exporting data and documents to and from Word, Project, Outlook and PowerPoint. For example, task lists generated in MindView can be exported to Outlook, and the lists can be synchronized as the project progresses. Fliegen uses OpenMind together with Microsoft Project and Visio. She used the software to sort the HR academy concept and plan the issues, steps and resources involved in setting one up.

Getting Started

If your company already has PPM software in use by IT or another department, begin by getting permission to use that software, and get help from experienced users. "A good friend in technology or finance never hurts," says Mercer's Burke.

If not, it is best to start with a desktop or SAAS application and become familiar with the protocols of project management before trying to implement an enterprise class system. Dartmouth's Josler advises new users to pick a project and try out the software, rather than try to learn its features without relevant context. "It can be overwhelming if you try to learn all the details of the tool itself without directly applying it to a project," she says.

Then, as users become familiar with the software, they can move up to an enterprise edition if needed.

"PPM tools tend to grow by infiltration," says Visitacion. "They get used for a project or two and then expand."