

# PROJECT in a box Implementation Experience

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## Introduction

Like most of the public sector in Canada, the Government of New Brunswick (GNB) has had to take a long hard look at how it operates. Services like IT, HR and Finance that are common to various GNB departments and agencies were an obvious focus.

In 2008 GNB established an ambitious Transformation Programme to deliver a new Shared Services Organization, and to transition four services (IT Service Desk, IT Infrastructure and Operations, Payroll and benefits, and Accounts Payable) from 28 different organizations into it by April 2010.

To achieve such a bold transformation, effective Project Management was seen as one of the key factors, GNB sought an experienced Project Director to head up the initiative's PMO. In September 2009, Englishman David Whelbourn was employed as the Project Director.

The outcome was that in April 2010, the New Brunswick Internal Services Agency (NBISA) started to provide a common Payroll service to two departments. In June 2010, a 12-month rolling-wave deployment enabled the implementation of shared IT Service Desk, IT Operations and Infrastructure, Payroll and Benefits and Accounts Payable services to all GNB departments.

## The Challenge

Recognizing that transitioning other potential services, coupled with implementing technology, would require the execution of a significant number of projects, NBISA's executive management team approved the creation of a permanent Project Management Office (PMO) to provide the support and consistency required for success.

The initial review identified 21 other potential shared services on the list for potential implementation into the new Agency. This meant that a repeatable consistent approach would be essential.

Given the task of establishing a functional PMO to support NBISA that was capable of running multiple project types, David set about identifying the current state of Project Management within GNB. The findings were:

- There was no overall PM Methodology within GNB and each project manager generally applied his/her own tools/processes.
- Many groups used SharePoint as a repository for project information with few common templates and processes.

## The Basic Requirement

The Vision for the PMO is to provide NBISA with project management professionals of choice, supported by best practices and tools, enabling the delivery of successful projects every time.

To deliver the vision the following initiatives were identified:

1. Adopt a standard Project Management Methodology
2. Install a common tool and repository for all projects
3. Develop a charter to legitimize the PMO
4. Build PM Capacity and Capability

The objective is to reach a Level 3 in P2MM within 18 months by enabling the embedding of PRINCE2 into NBISA's projects.

After adopting PRINCE2 as our common PM Method, a search was conducted for a tool that would support the adoption of PRINCE2, support real projects and help us reach a level 3 maturity. During the research, Project In A Box (PIAB) was found and we established that it met many of the requirements, it was decided to pilot an installation.

## 2. Install a Common Tool and Repository:

Using the Small Team Edition as a pilot enabled us to prove the system works for the PMO. It also supported the rapid adoption of the PRINCE2 method. Implementation was planned using the methodologies provided with the standard installation, with minimal tailoring. Using our Model Office approach to requirement validation, we tested our current processes and procedures with the templates and processes available within PIAB. This allowed us to test without a major investment in tailoring or tuning the methods. Once we had a successful operational acceptance test, it was only a short step to adopting PIAB in full.

We have tailored the standard methods to support our service transition method, as well as Lean Six Sigma continuous service improvement projects. The benefits we have seen from the adoption of PIAB are a reduction in administration time for project managers, and more time for leading and problem solving.

Once the PMO became familiar with the standard methods delivered free with PIAB, we created three tailored methods to suit our needs:

1. Service Transition Method based on BasicP2 method.
2. Lean Six Sigma method based on AccessP2 method.
3. A single method to hold the PMO Operating Manual.

Using the tailored Lean Six Sigma method with Standard Stages PM's are capable of establishing a Lean Six Sigma project environment, with a team assigned in less than 3 hours.

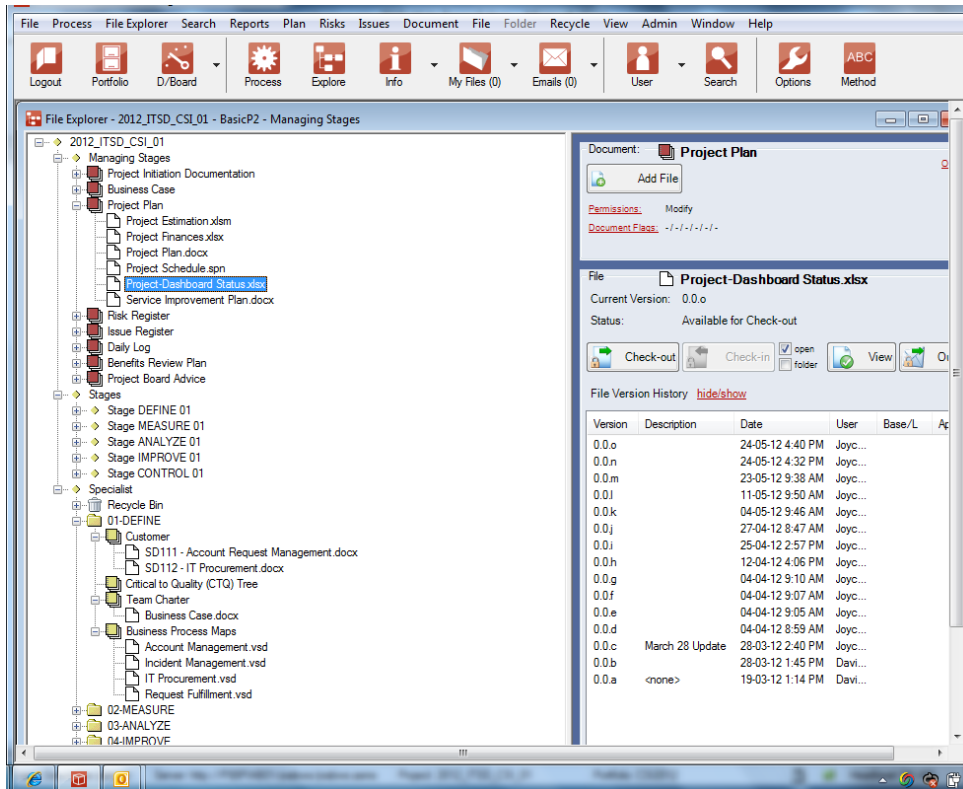


Figure 1 Lean Six Sigma Method - DMAIC

The PMO Operating Manual is a pseudo project that everyone can access. It provides a common repository of information to share within the NBISA PMO.

The screenshot displays the PROJECT in a box Enterprise Hub interface. At the top, the user is identified as GNB\DavidWhe Portfolio: AllProjects Project: PMO Operating Manual. The navigation menu includes Home, Projects, Overview, Team, Explorer, Project Report, Reports, Plan, Resources, About, and Help. The main content area features a central diagram with 'PMO' and 'Project Management' at the center, surrounded by various components like Transformation, Organizational Change Management, Performance Measurement, Standard Operating Procedures, Project in a Box, Roles & Responsibilities, Guidance, Product Description Library, Tools, and Project Selection. A 'What's New!' starburst is also present. To the right, a 'Documents [refresh]' panel lists files such as '010-Planning and Strategy(1)', '010-Planning and Strategy Stage(8)', '020-Design(14)', and 'AP Conference Room Pilot Acceptance Report.doc'. Below this, a 'Document [refresh]' section shows details for '020-Design', including file name, version (0.0.a), and status (Available for check-out). A 'File Version History' table is also visible at the bottom right.

Figure 2 PMO Operating Manual

The operating manual provides an easily accessible location for standard information and guidance on PIAB Operations (How to use PIAB the NBISA way) and provide access to:

- Standard Operating Procedures
- Templates
- Examples of completed templates
- White Papers on techniques
- Concepts

This simple approach provides all project teams with an accessible, searchable and scaleable knowledge repository. It enables new PM's to get up to speed with the NBISA Project Management Framework. Besides guidance on how and what to do at each stage in the project lifecycle, it also provides guidance on a whole range of project management subjects, from estimating to presenting, from how to conduct risk assessment workshops to stakeholder engagement.

It is becoming their first port of call to get the answer to any questions.

## Status Reporting

All project status reporting is through PIAB, starting with a common basic status report for all projects that utilizes the Project Commentary from PIAB, plus a summarised Dashboard level report in Excel. These combined to enable “push a button” reporting.

NBISA Project Management Office PROJECT in a Box - Report				
<b>PROJECT in a box - Project: Payroll Business Solution</b>				
<b>Status</b>				
Project	Stage			
Payroll Business Solution	Initiation	Current State Analysis	Payroll Solution RFI	MEC Solution recommendation
On Track	Completed	Corrective Action	On Track	Not Started
<b>Summary Information</b>				
<b>General</b>				
Project Name	Payroll Business Solution			
Report Date	10/2/2012			
Updated Date	30-09-12			
Description	Identify a common payroll approach for Parts I, II and III of GNB and receive government approval on a recommended approach.			
Commentary	<p>On September 24th all the teams met and presented preliminary team findings, concerns and comments related to each approach. The session resulted in decisions on the criteria and assumptions.</p> <p>The teams will use the information to finalize their evaluations. From the September 24th meeting it was determined that a jurisdictional review and risk assessment will be completed prior to final results being submitted to the Joint Initiatives Steering Committee (JISC).</p> <p>The risk assessment, vendor presentations (TBD) and stoplight activity have been scheduled. Part II Anglophone and Francophone "As Is" process mapping workshops were held this week. A JISC meeting is scheduled for October 4th. At the October 5th Project Board meeting the RFI evaluation results will be presented.</p>			
Status	On Track			
projectcode	NBISA-APP-2012-001			
Project_Manager	Joyce Brown			
Project_Sponsor	Andrea Seymour			
Business_Area	Parts I, II & III			
Customer	NBISA			
Method_Template	Standard PRINCE2			

Figure 4 Standard Status Report - Page 1




Report Date	2-Oct-2012		
Project Name	Payroll Solution		
Stage	Request For Information (RFI) Approach Evaluations		
	Status	Trend	Comment
Overall project health	Green checkmark	Grey arrow right	The main focus and activity for teams this week is to finalize the evaluation results for next week's October 5th presentation to the Project Board. The following activities were scheduled: risk assessment (Oct 11), vendor presentations (Oct 24 or 25 - TBD) and stoplight (Oct 26).
Ownership	Green checkmark	Grey arrow right	Governance Structure developed and Senior Responsible Owner identified. Steering Committee finalized. A Joint Initiative Steering Committee (JISC) meeting is scheduled for October 4th.
Schedule	Yellow warning icon	Grey arrow left	The financial team is challenged to meet the October 5 timeline by the range of costs provided in the submissions. Corrective actions are in place to recover and meet the October 5 timeline.
Resources	Green checkmark	Grey arrow right	Resources were assigned to the jurisdictional review and risk assessment activity. Discussions have started on potential resources and approvals for the MEC, Business case, RFP Resource plan and budget activities.
Risk	Green checkmark	Grey arrow right	-Data collection Part II; -New system implementation Part II; -Different Versions Meditech Part II; -School District Amalgamation Part II; -Availability and comparability of financial information
Budget	Green checkmark	Grey arrow right	Work undertaken within existing budget
Scope	Green checkmark	Grey arrow right	Scope accepted - Part I, II and III Payroll
Technology	Green checkmark	Grey arrow right	N/A at this point in project
Organizational readiness	Green checkmark	Grey arrow right	The outcome of the RFI may signal a significant change in the way payroll services are delivered. Attention will need to be paid to messaging in Parts I, II and III. Key stakeholder groups have been identified and an initial stakeholder impact assessment has been completed. Change impact and organizational readiness assessments by group are currently underway.
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  Project progressing to plan         </div> <div style="text-align: center;">  Project not progressing to plan and corrective actions implemented         </div> <div style="text-align: center;">  Project not progressing to plan and intervention needed         </div> </div>			

Figure 3 - Excel Dashboard – Page 2

We have elected to hold off on full stage-level reporting until the organizational understanding of Project Status reports is more mature.

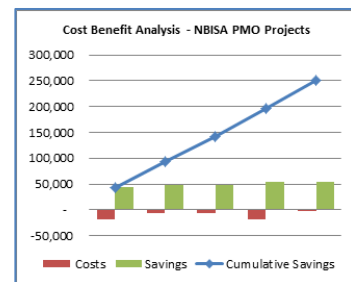
For Portfolio Reporting we pull together a simple portfolio report using PIAB data and manually manipulate until a standard is acceptable, then create a custom format. Ensure the reports provide focus on either actions or decision requests.

## Cost-Benefit Analysis for adopting PIAB

Potential high-level benefits of implementing PIAB were identified as part of NBISA Value Case assessment. They include:

- Reduction in Project Set Up time for the Project Manager reduced from one week to one day, based on 7 project managers establishing two projects a year the cost avoidance is \$19,091.
- Reduction in administrative time based on the time that would normally be required to produce status reports, based on saving 3 hours per reporting period cost avoidance savings for a year are \$6,348.

This would provide cost avoidance savings of approximately \$25,000 per annum.



The benefits of timesaving will enable project managers to spend more time on value-added tasks in the project, providing support for improved project outcomes.

We estimate that, in year two, the Project Managers, will have the capability and capacity to execute more projects simultaneously, thereby increasing NBISA project throughput, significantly enhancing the return on investment, and increasing the benefits being delivered to NBISA.

Payback for installing an Enterprise Edition was calculated to be less than one year, with cumulative savings in excess of \$146,000 over five years.

## The Outcome

All NBISA PMO projects are executed using standard methods within PIAB. All status reports are produced using standard reporting functionality built into PIAB.

After six months of implementation the PMO conducted an initial maturity model assessment using the P2MM framework for assessing the adoption of PRINCE2 and PIAB. The result indicated a maturity level of 2.4. We now have an operational plan to get NBISA PMO to a maturity level of three within 12 months.

Project managers are pleased with the capabilities PIAB provides to support their role. They comment on the level of professionalism it helps them to demonstrate with its approach to records management. They love the dashboard approach to reporting saying it has saved them nearly a whole day every two weeks.

Senior managers have expressed their support for the processes and recognize the key role that the Project Board governance structure plays in their success. They too see the output as demonstrating professionalism in project control.

### P2MM for NBISA-PMO June 2012

(assessments provided by PMO staff)

	FOCUS	Result Level
1 Our organization can be best characterized as having:	Maturity	2.43
2 Our management control is best described by:	Project	2.50
3 Our benefits management is best described by:	Project	2.29
4 Our financial management is best described by:	Project	2.29
5 Our risk management is best described by:	Project	2.50
6 Our approach to stakeholder management is best described by:	Project	2.86
7 We deliver organizational governance by:	Project	3.00
8 Our resource management is best described by:	Project	1.57
9 Organization	Project	2.57
<b>Final Maturity Score</b>		<b>2.44</b>

## Identified Savings

Since implementing the Enterprise edition and creating NBISA-tailored methodologies, the productivity of Project Managers has increased significantly. The benefits that have been recognized include:

- Project set-up time now takes less than half a day as opposed to one full day previously, improving on the savings already identified in the business case.
- Status reporting takes PM's 30-45 minutes as opposed to the 5-7 hours previously.
- Significant improvement in communication of project documents to teams and the project boards.
- Senior management endorsement of the PRINCE2 methodology and PIAB as a standard for all NBISA projects.

## Lessons Learned

- Create a business case to identify timesavings and other benefits that the organization will realize (i.e., project set up, reporting, improved communications).
- Demonstrate how PIAB supports the business in delivering its primary services.
- Install the standard version and pilot it quickly based on a standard methodology template. Minimize the urge to tailor the methods.
- Develop methods based on experience of pilot.

## Next Steps

- New Brunswick is the only bilingual province in Canada and we will be exploring the promising multi-lingual capability in PIAB to enable us to share the system with all project teams.
- Constant review of methods as part of lessons learned.
- Use PIAB to assist us in delivering improved resource, financial and benefits management, in order to achieve a level three maturity by March 2013.

For further information



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