

You are a special liaison to Warren Donoway, the president of Frederick Financial. You have earned a reputation for your uncanny ability to straighten out situations that have gone astray.

Frederick Financial needs your help again. Over the past few weeks Warren has been receiving emails concerning a project that is crucial to the company (attached to this post). Not only does the project team seem to be falling apart, but they just missed a major deadline.

Please respond to the request of President Warren Donnoway to,

1. Identify what is going right with the project
2. Identify the areas of concern for the project
3. Present recommendations for dealing with these areas of concern

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EMAIL FROM THE CEO TO YOU
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Greetings,

Let me start by saying, "thanks again" for all of your help in the past and for agreeing to assist with this dilemma on such short notice. Before you look at all of the material I have gathered for you, let me take a few moments to tell you how we got here...

About a year ago, our then CEO (Mr. Hanson) was attending an industry tradeshow and saw a prototype of the new CRM system just deployed at our top competitor - MCP Holdings. Though I'm sure you know, CRM is short for customer relationship management. This software was awe inspiring. It provided a single location for MCP to track every aspect of their interaction with their customers. It showed their portfolios, past transactions, personal information, and even the date and time of their last meeting. Though only a dozen or so of MCP's 5000 agents were using the system, the feedback from clients and agents was overwhelmingly positive. Mr. Hanson, through side conversations with members of the MCP prototype team, learned that there were significant hurdles anticipated in the full company wide rollout. Un-wavered by this warning, Mr. Hanson came back from the tradeshow with the idea to create our own CRM solution.

The initial impetus behind our CRM implementation was, "how do we get a single organized database of all of our clients, prospects and vendors." A committee was formed to provide guidelines for the project

and consisted of managers from all major departments. The committee ended with a scope document that described the major components of the system, along with a tentative schedule for the project.

Shortly after the report was delivered, Mr. Hanson stepped down from his position to pursue other interests. This is when I was appointed to the CEO position by the board of Directors. I really didn't know much about the project and didn't feel that I needed to. After all, I had my best project manager leading the project.

Before I go much farther, let me give you a brief timeline of the project. The entire project is scheduled to take eighteen months from the onset last June. Three major benchmarks were scheduled, one every six months. The project just entered its thirteenth month. I have summarized the benchmarks below:

Benchmarks

1. (6 months in) Aggregate all of the contact information on our customers across all of our product offerings.
2. (12 months in) Ability to search and update customer contact and account detail using the intranet system.
3. (18 months in - final deliverable) Integration of the new CRM system with the phone and email systems, so that all communication is automatically tracked and maintained. Pulling up a customer in the CRM system will provide links to the full text of all email sent to and from customer email addresses and links to recordings of phone calls between agents and customers (originating or received by our internal telephone system).

The first benchmark was met with outstanding success. Six months into the project the team released a customer contact list containing all of the customers of our company within a single Excel file. Though it may not sound like much, this was a big step for us. It was a large motivator for the team and the company as a whole.

The second benchmark deadline came last week. When I didn't hear anything from the project management I sent an email to the project manager. I attached the response I received. Shortly there after, I received emails from one of the agents that was using the system, and one of the developers on the team. I have attached those emails as well.

Here is where you come in. I am concerned that this project may be headed toward a death march. I'd like for you to come up with a small report that:

1. Identifies what is going right with the project
2. Identifies the areas of concern for the project
3. Presents recommendations for dealing with these areas of concern

Thanks again for your assistance!

Warren Donoway
CEO
Frederick Financials

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EMAIL FROM PROJECT MANAGER
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Warren,

I received your email the other day concerning the status of the CRM project. I'm happy to report that we just released our second revision of the project.

Though the initial reaction from the agents was less positive than the first revision, I attribute this to a lack of training on the system. I have spoken with the department managers and they have made policies to ensure that the workers use the system. I expect that over time the agents will become more familiar with the system.

There are two issues that keep me up at night.

1. I seem to be spending all of my time now managing the expectations of the department managers. They keep coming to me with new requirements and new ideas for the system. When we do get their changes put into the system, the managers are telling me that it is not what they wanted. Often, I will bring out the requirements list that we wrote up together. It always ends that misunderstandings and differences in interpretation are the cause for the problems.

2. In order to keep up with the daily inflow of requests, I need more staff. We are behind schedule even though most of the developers are working nights and weekends. More staff can spread out the workload and get us back on track.

Please let me know your thoughts on this last request.

Mark Carlson
Project Manager
Frederick Financials

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EMAIL FROM THE AGENT
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Mr. Donoway,

I am an agent and have been working with the company for some time. I have worked with several of our largest customers and I know the processes for how we do things around Frederick Financials.

This being said, I have great concern for the state of the CRM project. Specifically, it does not work the way that it was promised to us by Mr. Hanson and our department manager. Not only was the last release late, the way that it works causes an increase to our workload as opposed to reducing it.

Specifically, the system allows us search for our customers by last name. Every agent knows we look up our clients by company name. In order to use the system (which is mandated by our department manager) we have to print out a list of clients and their company names and look up in that list every time we want to use the system. The list is 40 pages long!

Please help with this project or let us go back to the old way of doing things,

Albert Davis
Agent
Frederick Financials

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EMAIL FROM THE DEVELOPER
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Hey Boss,

I'm writing this email in the hopes that explaining the state of the project from a developer's point of view will help to get us the assistance we need.

I have been working on this project from its onset, over a year ago. When the project started, things were going great. We had a well defined object and the four developers on the team worked together very well. We met our first benchmark and got rave reviews from the other company departments.

We increased the staff for the second benchmark dramatically to nine developers. Now it seems like we are stepping over each others toes, we have found duplication in effort and when we integrate our code we are finding lots of errors. We have been working well into the night and several of us have been coming in on weekends. Even though we are spending more time working on the project, we don't seem to be getting ahead much faster.

Last week we released our second revision of the system. This revision was designed to meet the broad goals of the second benchmark. Already we have received email from the agents saying that this revision is not what they anticipated and does not operate like they want it to.

Any help you can offer would be greatly appreciated!

Craig Sechler
Developer
Frederick Financials