Transformation & Change insight series

Transforming productivity and accelerating decision making with Collaborative Work Management platforms

The situation

One of the fastest growing sectors in technology* is the provision of low or zero code, self-configuring applications known as Collaborative Work Management platforms, designed to help teams interact and work across functions and geographies more easily and effectively. But how easy are they to implement and do they really work, or is this just an excuse for more technology spend?

The challenge

Every day we turn on our computers and start most days checking our emails for action and activity, but what are the most important tasks we need to complete that day and are we effective in completing them through this primary medium? And are we prioritising effectively across teams, functions and geographies in the most efficient way?

Teams working in silos; reports taking forever; poor accountability of tasks; too many versions of the truth; issues & risks raised too late. To implement projects and processes successfully through collaborative work management platforms, technology can be used to prioritise actions and align the processes and people to bring visibility, transparency & accountability to all projects.

The key question

Are collaborative work management tools the answer, or should your people just be more organised and do things better?

What do the experts say?

Good transformation leaders continue to focus on the three key lenses of People, Process and Technology to transform their business, but as complexity increases and speed to market is paramount, it is the synchronisation of these three components that is becoming key:

People: how do we ensure we have the right people, in the right place at the right time making the right decisions?

Process: how do we ensure the right processes are mapped, the critical path known and understood and designs, changes and milestones signed off by the right person?

Technology: a capable and well-organised PMO can provide a high degree of synchronisation in their own right, but as scale and complexity increases across teams, functions and geographies, the more technology can be used to simplify the task.

They can be used in a variety of different situations and functions, and not just on projects and programmes of work; e.g.:

- **New Product Development:** launching products on time and on budget, ensuring cross functional teams always know the status of the development and what they need to do next
- **Sales Team Tracking:** always have an up to date view on customer leads, sales forecasts, agreements & dates
- **Project / Product lifecycle:** managing the lifecycle of projects requests through Initiation, Planning, Execution & Closure. Provide the IT teams with clear status of all projects, tracking progress & budgets
- **Programme / Project PMO:** providing progress of the projects / workstreams, with key RAG status, % complete, tracking key milestones, next steps, RAID log managing the project lifecycle
- **Resource Management:** providing a clear view of capacity in the business by team & people now & in the future
- **Operations:** optimise implementation in the field, bringing visibility to what is actually happening
- Planning: help teams establish the planning rhythm in the business by tracking the key milestones and steps of key commercial processes e.g. Trade Planning & Promotions
- **Marketing:** campaign management, initiative tracking, content proofing, content calendars & managing events
- **Change Requests:** manage changes smoothly, with approval requests, notifications, resulting in successful changes with reduced errors

Case study

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A leading EU food manufacturer was frustrated with the lack of ability to share key data, progress and status across the group on their new product development process. This led to products launching late, poor relationships with retailers, inefficient internal working behaviours and inefficient patterns of work with periods of too much innovation, and others with none. The CEO would vent his frustration "if only we had known about this issue earlier, we could have done something about it."

The business discovered a Collaborative Work Management tool and immediately brought key calendars from various teams together, helping the business to plan more effectively over an 18-month horizon, balancing work across the year and integrating with retailers' calendars to launch products at the time the retailers wanted.

They created a standardised project template suite now used for all new product launches. This includes the project plan, business case, weekly update and change requests. The Project Dashboard brings all the key project metrics together in one place, helping the project team make better decisions, and helping everyone to know the part they play within a complex process.

The key metrics are discussed at team meetings and have led to teams consistently completing their work on time, ensuring products launch effectively. Users have found the tool easy to use and now other uses for the tool have been found in other departments: the Marketing team now uses the tool to plan, manage and track the creation of marketing campaigns across internal and external stakeholders.

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Key takeaways

- Collaborative Work Management tools can be an effective way of ensuring stakeholders are always aligned, enabling better, faster decision making through real time visibility of work execution

- They don't need to be restricted to projects and programmes of work and can be used across a wider set of functions and processes to drive greater ROI and productivity

- However, the answer to inefficient work practices may not be what you think it is, so before taking the step towards a significant Collaborative Work Management Platform investment, take advice

- The ideal solution may be leveraging several, proven, specialist/best-of-breed third-party tools to deliver a "modular" solution tailored to the needs of the company

- If you do entertain a full-blown Collaborative Work Management Platform, make sure you take the right steps to select, design and implement the right solution for you

For more information on this and our wider capabilities, please do not hesitate to contact us.

The Barton Partnership

The Barton Partnership represents an extensive network of former top tier consultants with subsequent industry experience across the UK, Europe and internationally. We mobilise individuals and teams to solve your business problems, from advisory through scoping and problem solving to vendor selection and implementation.

We pride ourselves on the relationships we build with our clients and with our consultant network. Where we are not able to address your issues directly – either it is outside our skill area or the project is too big - we work with a curated network of product and solution providers to offer a comprehensive Strategy & Delivery capability.

Cheetah Transformation

Cheetah Transformation is a consultancy that helps companies transform their processes and projects by synchronising the three key elements of people, process and technology.

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