Our client didn’t think they had a data problem. They thought their challenges were not about numbers or formulas – they were about who dropped the ball, who didn’t follow the process, and who had ignored the email from their manager. This organization was frustrated by more mundane concerns after surviving a drive-by management consultant’s reorganization. They faced annoyances and challenges merging disparate operations practices to manage an overgrown inventory of regulatory documents, and they wanted a way out.

These managers weren’t interested in regression analysis, factorials, or k-means clustering. They just wanted to be able to keep track of their staff’s work. Everyone wanted an environment that promoted accountability, but they were getting broadsided by their inability to keep track of the division’s activities. Forgotten projects popped-up out of nowhere while other projects simply languished through inattention. The client’s main project tracking tool – an Excel spreadsheet – wasn’t working, but it was a stepping point to survey the landscape.

This humble spreadsheet had some problems. First, it was flat data. There was no way for a project to contain multiple values, so only the most current update or project owner was recorded. For example, if Mary took over Eric’s project, there was no way to track the hand off. Second, the data lacked cohesive structure. Naming conventions were not enforced – which meant that three related policy projects would appear to be completely separate from each other. Third, the tracking was isolated from other business activities. Once a project was completed, the record was archived and forgotten. A separate inventory of all recurring regulatory projects existed, but there was no way to reference between the two.

And yet: imperfect data is still data. Project deadlines, whether missed or met, are a numeric data point. Status updates, whether they are recorded or neglected, are a qualitative data point. The client had data, but they just weren’t collecting enough of it or deploying it effectively. When we decided to look at the human problems as a series of data challenges, the temperature in the room finally dropped. Finger pointing turned into metrics.

E3’s solution was less about cutting edge analytics and more about yeoman project techniques. Using the data from the client’s project tracker, we created input forms that structured the data entry. Certain critical fields were required to submit a project, or the user received an error. Deadlines were automatically calculated from the date the project was started. We standardized project descriptions and project types. We tied user names to the global address list, both to normalize naming conventions and to allow for automatic notifications. During a demo, a room filled with middle-aged managers lit up with excitement when a project was created and they received an email on their iPhones. The one-stop project fed into color-coded dashboards that showed which projects were on-time, overdue, and coming up soon.
The magic didn’t last for long. Even when given a dynamic project form, humans don’t crave to input data. And so, the staff disagreed over what information was important. They insisted they had put in information when they had not. They blamed the system for being too rigid, too slow, or a just another waste of time foisted on them by leadership and their consultants.

And then a project fell right through the cracks. The colorful, real-time dashboards had not been monitored after the demo. Someone had not entered their project into the database.

Our client wanted a solution. As embedded project staff, we not only had designed the solution but were on site to help maintain it. We couldn’t just drive away. So, in 30 minutes, we created a one-page report that showed what was due in the next month, the month after, and the month after that. Each project had a clickable link that displayed all notes, comments and project documents. The dashboards remained, but the report would be built into weekly staff meetings.

In an interesting twist, our clients became avid consumers of data. They asked for metrics that led to additional development and dashboards. We created automated scripts that identified which projects had been completed and which had not been updated. We audited the project data against the project inventory until we were confident that projects would only fall through the cracks if our client ignored the red color-coding. They kept asking for additional tools, and the one-pager became 30 pages of closely scrutinized data.

Suddenly, our client realized that, while they may not have a data problem, they did have a data solution. None of the staff had changed, but their tools allowed them to ask questions and get answers without a creating a frenzied data call. Three changes happened.

First, getting quick answers altered the questions. No longer were managers wondering what project was going to surprise them on a Friday afternoon. The database answered the question of where projects were, when they were due, and who was handling it. The managers started asking questions like, “How could we reduce the number of projects? How can we move this quicker through the building? How can we have fewer people touch this project?” They operated from a position of knowledge rather than confusion.

Second, real-time answers changed the organization’s behavior. That 30-page weekly report was distributed to the entire division, with project owner’s names clearly identified. No one wanted their name to show up on slide 12, which identified troubled and overdue projects. It was impossible to fly under the radar, since projects that had not been updated in the past week were highlighted on slide 17. Staff members became very interested in maintaining data integrity.

Third, getting answers changed the management. It quickly became apparent which types of projects required more effort and offered less benefit. Managers could actually manage their people, rather than wondering what they were working on. In six months, the amount of time to complete a project was reduced by 49 percent. People knew who was working on what and how long it took.

As we learned, the tools and technology that make Big Data possible can also help with day-to-day operations. What used to be in the province of data scientists is now in the hands of savvy project managers. E3 views data analytics as a key component of project management, whether by creating dashboards, metrics, or automated reporting. By deploying these tools intelligently, managers can spend their time managing work rather than begging their staff for updates. Even small data sets can help drive organizational decisions and allow them to deploy their resources for success.

Want to learn more about E3 and about our Data-Driven Decision-Making (D3) capabilities?

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