

Onit Builds Customized Project Management Toolkit; Designs Process Adoption Strategy

1. Issue: Onit's client, a multi-agency local government organization, had struggled with inconsistencies in how projects were executed, monitored and evaluated in different parts of the program. With staff drawn from different departments, divisions and agencies, the multiple different methodologies and project approaches

made it hard to share resources and accurately communicate status.

Onit Management Consulting was hired to perform a full evaluation of the client's approach to project management, develop a methodology that would work across the whole program, and train staff in using the new project framework.

2. Strategy: Onit immediately recognized the need for a comprehensive evaluation of the client's project management needs, followed by the creation of a system deeply rooted in project management best practices.

It was also clear that the client culture was strongly consensus-driven, with a great deal of value placed on peer relationships and support. To be successful the strategy needed to ensure staff would gain new skills that would be valued and respected within the organization, and that they would see rapid benefit from applying the new project management methods. In an environment so driven by peer support, a careful adoption program also would be essential.

3. Crafting a Solution: As the project would require extensive change management support in addition to project management system design expertise, Onit put together a team including specialists in project management training, Prosci ADKAR change management, communications and adoption.

The Onit team's first task was to gather information about how different client teams managed their projects, where teams felt their current project management methods had strengths and opportunities, and what types of improvements might be meaningful to them. Onit conducted a survey to get feedback on project preferences, tools and practices, then conducted stakeholder interviews to assess requirements.

Onit's technical team then began designing a set of project management processes and templates customized to the client's environment, and built an 8-session training course to teach client staff to use the toolkit. Prior to a full rollout the toolkit was tested by a pilot team, with refinements made to the toolkit and the training based on the pilot team's feedback.

While technical design work was underway Onit's change management team worked on an adoption plan to support the training. The plan included both passive and active tactics – passive tactics such as a poster campaign to reinforce messages from the training sessions, and active tactics such as coaching sessions and roundtable discussions to embed the toolkit into in-flight projects.

4. Results:

- A framework of project management processes and a comprehensive toolkit of templates were uniquely customized to the client's environment.
- An 8-session training program was developed, plus supporting materials for later client use.
- Adoption activities successfully reinforced messages from the training sessions.
- Nearly half of the client's staff attended the initial training. A second training series was scheduled along with follow-up coaching.