

# *E.J.'s* **Journal** **Adventures in Technology**

BY E. J. SIWEK, CMP

*This is part seven of an ongoing series.*

**T**he president of the company asked me, rather than our director of information technology, to serve as the overall project director for the implementation of a new software program. His decision was based on two considerations. First, if properly executed, OverQuota® would provide an excellent tool for sales management along with being a conduit for mass marketing campaigns. Thus, my department had the most to gain from a successful implementation. Secondly, I had served a similar role in a former job.

Needless to say, the project could fail if the director of IT and I could not work well together. As I noted in a previous column, I am not a computer geek with vast programming knowledge. My experience is in marketing concepts, meeting management and enhancing ROI through business process management. I see computers as a tool to assist with work, not to govern work. However, in our case, the keystone of this project rested with the successful knowledge transfer of both Lotus Notes® and our general data structure from IT to me. In addition, the transfer of marketing knowledge and process from me to our director of IT was imperative if we were to be successful.

In most cases, the knowledge

transfer alone can be cumbersome; however, to add an additional challenge, I was tossed into the Notes environment after being reared in the Microsoft arena, while our director of IT cut his teeth on the Notes platform and had limited programming knowledge of relational data structures. In essence, our backgrounds and strengths were polar opposites. This separation of knowledge actually made for a stronger team because each of us had a considerable amount to share.

Added to the project stew was the management of our training product line. I was responsible for coordinating an international conference of attendees from 62 countries in the fall of 2000. Both of these jobs' responsibilities produce revenue and add to my daily pressures. These two efforts are time consuming and important if the company is to grow.

Can we do it? How do we do it?

Honestly, I don't know yet. I am 60 days out from the conference, mapping 2001 marketing plans and spending an extra 12 hours a week on strategic planning sessions. These activities are in addition to my role as project director. The good news is that my product line is achieving its year 2000 target. By the time this article is pub-

lished, I will know whether we can achieve our system integration goals.

Over the past few months, the IT director and I have taken several steps along our journey to bridge our knowledge gap.

First, we jointly own the project. The success of the project requires input and direction from both of us. We respect one another's capabilities. Neither of us considers our turf more important than the other's. All organizations require a revenue stream (my role) and an operating IT department to be successful.

We meet in person and exchange e-mail regularly. Because I travel frequently, much of our communication is via e-mail. In addition, when I am in the office, we take time to adjust our white board options as we encounter changes in the Business Requirement Document (BRD). (Remember, the BRD is the project blueprint. However, just as you use a blueprint to build a new house, once you begin building, you or the general contractor may need to make decisions that alter the blueprint. The IT director and I serve as the project's general contractor.)

Early on in the project, I also engaged the assistance of one of my staff to serve as a liaison between the IT director and me. This person helps transfer marketing knowledge ranging from defining new fields to deciding how we

will track individual marketing efforts. In addition, the staff member was trained in the configuration of OverQuota. In OverQuota, the configuration database is one of several that are linked together. The configuration database is where all field parameters, security and drop down lists are maintained. I depend heavily on the liaison. She has a solid grasp of technology and has rapidly adapted to the Notes environment. She has a vested interest in the project because if the system is properly defined and configured, her job as a marketing assistant will become easier.

One of the benefits of this liaison is that over the course of the past few months, the IT director has grown comfortable with both challenging marketing criteria and working directly with us on all areas involving the OverQuota project. Early on in the project, he would hesitate and tend to wait until he and I had the time to discuss the issue. It is not uncommon for these two to ask me to arbitrate from time to time. In these instances, we pull out the white board and either map out the process or identify the pros and cons of adjusting a certain element. In the end, we usually reach consensus.

But, most importantly, after we have discussed the issue and clearly stated our intention, we will pull in users who are involved in

the core area we are reviewing so we can ensure that we have considered all details and potential ramifications. Taking this last step, I think, is important for the success of the project. First, it helps us review and further clarify the issue at hand while providing end users with a sense of pride and satisfaction that their input and role in the company is important.

In the end, for this type of project to succeed, the IT department must be involved and fully engaged. All players must look at the larger vision, stay focused on the timeline and budget issues and gain consensus that puts their individual corporate roles and internal politics aside.

Next month, we will look at managing the project using team talks and the project status database. ▲



E.J. SIWEK, CMP, is director of marketing for Excel Partnership, based in Sandy Hook, Conn. He is also president of Flashpoint Technologies,

LLC, in Bethel, Conn. Send comments and questions related to this column to [publications@mpiweb.org](mailto:publications@mpiweb.org).