

## CASE STUDY: ROADMAP AIDED PROJECT EXECUTION USING EDEN™

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A bank has identified the strategic opportunity to expand their market segment by providing banking services to low-income individuals living in the rural parts of South Africa.

The project completion duration was set to nine months to ensure that the relevant bank would be first to market with such an initiative. An appropriate budget was allocated, and a project manager appointed. The holdings board further identified rock-bottom service cost and excellent accessibility to clients as key objectives of the initiative.

The project manager immediately identified several teams to address the key elements of the initiative: a compliance team, technology team, products team, service team, marketing team and an integration team. The compliance team was tasked to identify laws and regulations the initiative had to adhere to and suggest ways to do so. The technology team was instructed to find appropriate hardware and software systems to enable the successful operation of such an initiative.

The products team had to design the specific product offering for the target market in question, while the service team was tasked to design mechanisms required to service the prospective clients to ensure extreme client satisfaction. The marketing team was responsible for proposing appropriate methods to introduce the initiative to the potential client base, as well as to build the new brand. Lastly, the integration team was responsible for ensuring the successful integration of any new systems, head office systems and third party systems.

Since the details of exactly how the objectives of the project were to be reached were unclear during the first three months of the project, it was decided not to draw up a detailed project plan for the early phases of the project. Furthermore, due to fact that the various teams had to interact continuously in order to ensure that a workable solution is implemented in minimum time, it was decided that effective information sharing would be one of the critical success factors. The project manager decided to use EDEN™, a web-based innovation project management platform, to ensure that all project information can be accessed

and deposited from any location having Internet access. The next steps were to create EDEN™ accounts for every team member and for the project manager to select an appropriate roadmap from EDEN™'s roadmap templates to facilitate the execution of the overall project - a roadmap was selected and some minor changes made to be representative of this specific project.

## EDEN™ ROADMAPS

To ensure that team members actively use EDEN™ as their project environment, each team was asked to create their own roadmap - either by customising an existing roadmap template or by developing a roadmap from new, based on the high-level activities of the team. Every team accordingly evaluated EDEN™'s innovation roadmaps to find a roadmap suitable to guide their team through the project challenges that lay ahead.

All teams, except for the integration team, found suitable roadmaps and made the necessary changes to configure the roadmap to the respective team's needs. The integration team decided to develop a roadmap from scratch, suited specifically for their needs. After selecting an appropriate roadmap, each team went about to detail their roadmap by complementing each step with a concise description of the relevant step along with any additional templates, examples, best practice and background information available at that point in time.

## EDEN™ PROGRESS TRACKING

The project manager and team leaders of the various project teams then identified the key deliverables of every roadmap step as well as the relevant input and output documents per deliverable. In order to add these details to the relevant project roadmaps, the team leaders subsequently configured a checklist - consisting of the relevant deliverables of the appropriate step - for each appropriate step of their team's roadmap.

These checklists are used throughout the project to guide the team through the completion of the step at hand and to share the progress with other project members.

## EDEN™ ROADMAP INTEGRATION

Subsequently, each team divided the responsibility and accountability for the respective deliverables between the team members. Each team member then added more detail to the relevant roadmap steps they are involved in, by creating specific folders to group the relevant input, output and background information documents for the relevant roadmap step.

The initial integration of the various project roadmaps is realised by linking related steps between different team roadmaps by making use of the folder shortcut mechanism. A folder shortcut is a mirror of a folder located in a given step in one or more other steps.

Folder shortcuts is a handy mechanism for sharing information, generated by one team, in context with the activities of the other team - making it possible for each team to work with the information in the relevant folder within their own roadmap.

Any changes to the content of the folder in question will be reflected in any other roadmap step containing a shortcut to the relevant folder. The project manager or team leader can further restrict access to sensitive roadmaps, steps, folders and documents by setting appropriate permissions as the need arises.

## EDEN™ USER INTERACTION

Once the initial setup was completed, the respective teams started their innovation journey using the roadmaps as guides to ensure that all efforts are directed at realising the initiative at hand. As the project progresses, team leaders change their team's roadmap to represent the current state of affairs by renaming steps, adding new steps, folders and documents, also by deprecating or linking steps, folders or documents from other roadmaps, changing deliverables and updating the status of the various checklist items. More importantly, documents contained in the relevant roadmaps are continually updated with new versions as time progresses. Any project member can monitor the status of key documents with the advantage of being informed via an e-mail notification as soon as the relevant document is updated.

## EDEN™ WORKSPACE INTEGRATION

Any new project-related document is created using a special EDEN™ utility to place it in a reserved location on the relevant project member's PC and immediately uploading the relevant document to the shared project environment in EDEN™. Sending existing documents to the shared project environment, while working with these documents, is made possible using the easy-to-use EDEN™ toolbars in all mainstream office editors and web browsers.

## EDEN™ DOCUMENT COLLABORATION

Documents contained in EDEN™ roadmaps can easily be shared with other project members, without having to leave the system, by sending e-mail links to the relevant document to other project members with an appropriate message. Once an e-mail message containing such a link is received the recipient simply clicks on a hyperlink - EDEN™ then launches automatically, the recipient supplies the relevant login details after which EDEN™ will automatically navigate to the roadmap step and folder containing the document in question. The user then chooses either to open the document, export the document to his PC, reserve the document for editing or to copy the document to another EDEN™ location.

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## EDEN™ ACTIVITY MONITORING

Any project member can further keep abreast with the activity in any of the project roadmaps by using the Activity Summary functionality. By using the Activity Summary, the user can see all documents that have been updated or entered since his/her last login, as well documents he/she recently worked on along with very active project documents.

## EDEN™ INFORMATION SUBMISSION AND RETRIEVAL

Any user with the appropriate permissions can reserve a document for updating, rendering it impossible for other users to simultaneously change the document,

while still allowing other users to open the relevant document. Once a document is updated, a new version of the document is saved to the system along while retaining all previous versions of the document in question. EDEN™ automatically prompts for information regarding the document or update. The user may then select fields to complete: document description, summary, decisions taken, person responsible, or expected finish date. Subsequently, EDEN™ automatically suggests keywords to be attached to the document to describe its contents. These keywords can be used to get a high-level indication of what the document's content entails and also as a mechanism to easily locate the document in future. Project members can also find any document in the EDEN™ environment by using a Google-like searching functionality or by simply browsing through the relevant project roadmaps.

## EDEN™ SOLUTION

Carefully aligned project and team objectives, well-defined team interactions, centralised, up-to-date information in context of project activities, and roadmaps guiding project teams, all contribute to an ideal environment for executing fast paced innovation projects with high levels of associated uncertainty. Once the project is completed - whether the outcome is successful or not - all electronic project information has been captured from the initial research up to the final report. Refinements to the implementation can then be done and associated information added to the relevant roadmaps. The roadmaps used for the execution of the initiative serve as a possible starting point for any related future initiative.

More specifically, these roadmaps and associated documentation can be used to learn from mistakes or successes from previous initiatives, develop or update document templates to speed up future efforts, identify new best practices to reuse in future initiatives, understand the context of decisions made in previous projects, and possibly to understand the detailed makeup of all processes, products, systems for quicker future improvements.

Having integrated roadmaps available to drive a major improvement initiative enables multi-disciplinary teams to work towards shared objectives in an interactive, parallel manner. This ensures that all aspects of the solution are addressed as early as possible leading to a more thorough design and less unforeseen changes in the implementation phase.

