

Case Study

Midlands Co-operative Society



Midlands Co-operative Society: Striving for the competitive edge by increasing Project Maturity levels.

Increasing energy costs, dominance of the big four supermarkets, soaring food costs, growth in online travel bookings and a decline in the death rate are just some of the diverse challenges facing Midlands Co-operative Society on a daily basis.

Employing almost 8,000 people, the Midlands Co-operative Society is the largest regional Co-operative Society in the UK. Trading mainly in Derbyshire, Leicestershire and the Greater Midlands, the organisation has recorded gross sales in excess of £749 Million. The principal areas of activity include Retail (food and non-food), Travel, Funeral Services (including Florists) and Transport. There is also a substantial investment property portfolio.

Midlands Co-operative Society stands apart from other retailers as it is owned by its members who share in trading profits through the payment of a biannual dividend. Each member has one vote and can exercise their democratic rights twice a year at Members' meetings and through elections. For Midlands Co-operative Society, community involvement is fundamental to its principles and drives the corporate vision of making a difference.

The company's Business Support Centre, located in Lichfield, Staffordshire provides management and support for operational activities. Every year Midlands Co-operative Society is audited by external auditors, with project maturity being one of the aspects continually re-evaluated. Having started to develop their project processes in 2005, the audit in 2006 revealed a greatly improved score for project methodology. However, it was felt that there was a requirement for a project tool to underpin this enhanced methodology.



Midlands

After a period of vendor selection it was decided that the Microsoft Enterprise Project Management toolset offered Midlands Co-operative Society a flexible solution that would grow, adapt and underpin the evolving methodology. Before the implementation, project planning and resource management were being conducted in isolation; Project Managers planned separately with stand alone versions of Microsoft Project and it was difficult to schedule projects particularly when the timings of other projects changed. It was also difficult to schedule projects around other resource commitments such as holidays and training.

The objectives of the implementation for Midlands Co-operative Society were to:

- Produce a project portfolio that would enable progress throughout the year to be tracked.
- Maximise the utilisation of resources.
- Enable the collective planning and delivery of projects.
- Improve visibility to all on project progress.
- Increase the number and quality of projects being delivered.

'CPS were chosen to implement the EPM solution due to their response and understanding of the Midlands Co-operative Society's business requirements and environment. They understood that the process of project management and getting people on board are just as important as the technology. They also understood that a successful implementation would be the toolset fitting the process and not changing the project process to fit the tool. The advice Midlands Co-operative Society received on how to get the most out of EPM one step at a time was second to none.' comments Barry Hodge, Project Manager at Midlands Co-operative Society.'

The Implementation

The implementation of an EPM tool is completely organisation-dependent. It is important to understand the requirements of the organisation, the processes that the tool must support, the needs and pain points of the people that will interact with the system and the organisation's capacity for change. With this in mind, a phased implementation approach was taken at Midlands Co-operative Society, rolling out functionality over a period of time, and only after suitable training and acceptance from the end user had been achieved.

With this in mind, CPS set about ascertaining functionality requirements through a series of requirement gathering (discovery and envisioning) meetings with representatives from the various internal departments, including Finance, IT, infrastructure and service desk. This approach facilitated a better understanding of what level of functionality each area was willing and had the capacity to accept as part of the first phase of the implementation and enabled CPS to help Midlands Co-operative Society shape how the product would fit seamlessly within a culture that is over 100 years old.

After these discovery and envisioning workshops, a prototype working system was put together in order to demonstrate back to the project stakeholders that CPS had correctly understood the requirements. This was further refined, with all unnecessary functionality turned off to keep the interface as understandable and unthreatening as possible. Included in the functionality for first phase rollout was:

- A central repository for all plans (both Project and business as usual/absence) to enable project managers to plan together rather than separately.
- Metadata tagging of projects and resources in order to provide grouping, sorting and tracking information for each.
- High level resource management (a more complete picture of who was working on what and when).
- A central resource pool with generic (primary role-based) resources for building up a longer term picture of resource requirement.
- Reporting through the use of project metadata displayed in various grouping formats in the project centre, resource centre and data analysis.

- Project workspaces – a project-linked SharePoint site for tracking and logging of risks, issues, change requests and project-specific documentation (Project Brief, Business Case).
- Reporting task progress and work remaining through the use of the task updates – team members updating tasks, approval and acceptance by project managers into the project plan.
- SharePoint – To enable websites for each project making it easier to share and find project documents with no ambiguity over use of the correct version.

The EPM implementation process took two months from start to finish. In total the final end users totalled six Executives, five Project Managers and fifty Team Members. Support for the rollout of phase one was provided in the form of consultant time spent on site working with the business, training of all interested parties and access to specialised third-tier knowledge through the CPS Support Helpdesk.

Reflecting on the change, Barry Hodge concludes that;

'Before implementing EPM Midlands Co-operative Society delivered 13 projects per year, now with EPM and the same staff numbers, Midlands Co-operative Society deliver 30 projects per year. However, success with the product is a gradual process dependant on the culture of the organisation and the willingness of people at all levels within the organisation to adopt the toolset. It is equally about the people and the product.'

The Results

Every year Midlands Co-operative Society is audited on its IT controls. One important aspect of the audit is project maturity which is scored on a scale of level 1 - level 4. Best Practice is set at level 3. The implementation of EPM has ensured Midlands Co-operative Society continues to exceed Best Practice standards and score high on its Project Management.

Despite this immense progress, it was felt that one of the aspects that could still be improved upon was the ability to check that all projects were being delivered in accordance with the Best Practice methodology. To improve and try to reach the highest possible audit score, Midlands Co-operative Society implemented CPS' Project Auditor which has enabled self audit and ensures that all projects follow the Midlands Co-operative Society project methodology.

In 2008, another department within Midlands Co-operative Society noticed the success of EPM within the IT department and decided to also implement the solution. Property Services and IT often work together on a number of projects particularly around the build of new stores. Rather than putting in a separate EPM solution, both departments will now use the same system allowing IT and Property Services to work both independently on their project delivery by having their own templates and methodology, but also have the ability to share resources and link dependencies. (See diagram 1)

By streamlining projects and resources, increasing project maturity and adhering to best practice methodologies, Midlands Co-operative Society has more than doubled its project effectiveness and output. In a challenging market place that requires Companies' to be efficient and cost-effective, Midlands Co-operative Society is a leading example of how collaboration and control can help achieve goals and maintain productivity.





Corporate Project Solutions
Regal House, 4 Station Road
Marlow, Bucks SL7 1NZ

t 01628 895600

f 01628 895601

e solutions@cps.co.uk

cps.co.uk