

ProjectWorld Forum
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***What C-Level Executives want
from Project Managers***

Case Study presented by:

Robert Angel

www.gilfordgrp.com

416-972-9196

The Customer Focused Project

- **My background: large projects as CFO, PM, team member**
- **Gilford Group consults in marketing and financial strategy**
- **Case study based on 3 separate projects**
- **Composite view of effective PM initiatives and what distinguishes success versus failure**

Challenging Project Environment

- **ITworld: CIOs are being very careful with spending, outsourcing to grow 1%, consulting to shrink 4.6% in 2003**
- **Forrester's CRM executive satisfaction rate:**
 - **70% satisfied, focus on customer experience not technology**
 - **25% of dissatisfied cite application usability**
- **CRM problems: 46% say process change, 34% back end integration, 33% software costs, 23% end user adoption, 14% technology selection**

The 3 Projects

- **CFO example: Sell ship building contract (project to bid against fierce competition, used finance as differentiator)**
- **Vendor PM example: CRM 10-month bank project (sell/implement an automated customer analytical system, tight window)**
- **Team member example: Consultant to CRM 1-year bank campaign management project (business case, business requirements, implementation Roadmap)**

What does 'C' Level Executive Want?

- **Business focus – on business requirements**
- **Strategy focus (make decision, then move on) vs. operational focus (will it work?)**
- **Group alignment (Marketing, IT, Finance, Ops)**
- **Speed – on time/on budget (not fait accompli)**
- **Early warnings – anti-frustration factor**
- **Low political risk**
- **Measurement of results**

Lessons Learned

- **Need engaged executive sponsor**
- **Focus on what business (not project) needs**
- **Project changes can affect business case**
- **Culture change can be a major challenge**
- **The PM must understand the project (content, not just process)**
- **ROI is threatening**
- **Principles can get lost in real life**

About The Gilford Group

- **Client relationships and marketing strategy consulting**
- **Performance and knowledge management consulting**
- **Methodologies for event detection and business cases**
- **Specialty in Financial Services**
- **Marketing management and business requirements definition for two leading technology companies**
- **Philosophy: “It’s all about the *customer*, not us”**



President

The Gilford Group Limited

1 Balmoral Avenue, Suite 617

Toronto, Ontario M4V 3B9

T 416- 972-9196

C 416-704-7575

F 416-972-9261

E-mail: bob.angel@gilfordgrp.com

Web site: www.gilfordgrp.com