

## CASE STUDY: CHALLENGE OR OPPORTUNITY? IT'S IN THE EYES OF THE BEHOLDER

### Situation

A number of years ago, we were required to upgrade our capital planning system as it was no longer compatible with the enterprise software system. Complicating the matter, there were no internal IT resources available to support the conversion.

### Action

The “default” choice was to make only the necessary upgrades to permit continued functionality. I chose to approach the challenge as an opportunity, working from a “blank slate”. My team worked with stakeholders to determine what functionality was most important. We also identified gaps, which could be addressed to significantly enhance the system value to our clients.

### Result

What started as a software upgrade evolved to a more significant process change. We incorporated a strategic planning component, which helped link the annual capital plan to the long range capital plan. This was a philosophical change which emphasized the importance of strategically planning major projects such as new facilities or major technology initiatives.

We also incorporated electronic routing and approval, a relatively novel concept in the mid-90's. Lastly, we included a robust reporting tool, which provided better information to customers, while allowing us to standardize a cumbersome ad hoc reporting process.

### Lasting impact

The robust tool we created provided a platform for all capital planning activities from tactical execution through long range plan development. This system eventually served as a prototype for a companywide solution and was even carried forward into a subsequent SAP implementation.

What started as a significant and frustrating challenge became a marvelous opportunity!

### Keys to success:

- The decision to outsource the solution was only made after a considerable effort to use internal IT resources – as a result, IT supported us as they were able, rather than battling for control
- “Do nothing” was not an option as the original software version was no longer supported – this defused a major impediment to change
- Rather than simply replicating the old system on an upgraded version of Oracle, we took the opportunity to rigorously assess the entire process with a significant voice of the customer input
- Throughout the initial design process, we tested solutions with key user populations to ensure we were capturing their feedback correctly
- Our initial version was not perfect but it was usable and we committed to a staged process which ensured a robust base solution before incorporating new modules



### What people are saying....

- “Ed is a highly goal-oriented individual. He is extremely intelligent and confident in his work, and when he decides to accomplish something he fully dedicates himself to the task in such a way that it is completed quickly and skillfully.”\*
- “He works fantastically with teams and is an excellent motivator because he is so friendly and inspiring. When watching him work on a project, others are encouraged to commit equally to the task, resulting in projects that are well designed and implemented.”\*
- “Ed provided support to my research area, encompassing ~ 200 scientists over many years. He managed to blend business acumen with a much more rare appreciation for the challenges of conducting basic research in a large organizational setting.”\*
- “His detailed knowledge of policy and procedure and consistent and reliable compliance with best practices is complemented by his exceptional judgment.”\*

\* Comments made by colleagues and managers in an anonymous online survey.