



Project management and (virtual) cake

18 November 2020



@AdaptaforNFP

Adapta Consulting

We are:

- A specialist information systems consultancy
- We only work with membership organisations, charities, associations, trusts and others in the NfP sector
- We are completely supplier-independent
- Our consultants have held senior positions in a broad range of different organisations
- Our advice and guidance is based on practical experience gained over many years
- ... apologies for the lack of cake...



Programme

- 14:00:** **Welcome and introduction to the event**
Overview of the session and introductions
Feedback on the survey
- 14:15:** *Move into Breakout Rooms – introductions*
Opportunities and challenges with managing projects
- 14:30:** **Case Study: Lauren Weller, Salesforce Principal Officer, NCB**
- 15:00 Grab a coffee*
- 15:05:** **Breakout Room Discussions & Sharing**
- 15:30 Move back into Main Room*
- 16:00:** **Close**

Rules of Engagement!

- 'Share screen' should only be used for speaker presentations.
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions.
- Your profile name should be your name and organisation – Hover over your name in Participants and select Rename.
- **If you have a question relating to the speaker presentations, please submit these at any time using the Chat feature.** Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- We'll be sharing the Adapta slides after the event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.

Breakout sessions will discuss:

1. What changes have you had to make in running projects in your organisation because of Covid and working remotely - and how have they impacted on your project
2. What skills do you think are important for:
 - the project sponsor
 - project manager
 - project team membersand are there any new skills you've needed because you're working remotely?
3. What are your top project tips and tricks that others might learn from?

Each group will have a member of the Adapta team who will facilitate the discussion and capture headline notes. Everyone will be returned to the main room for wrapping up.

During breakout sessions: To contribute you should raise your hand using the 'Raise Hands' feature. Unmute once you have been prompted to by the Facilitator.

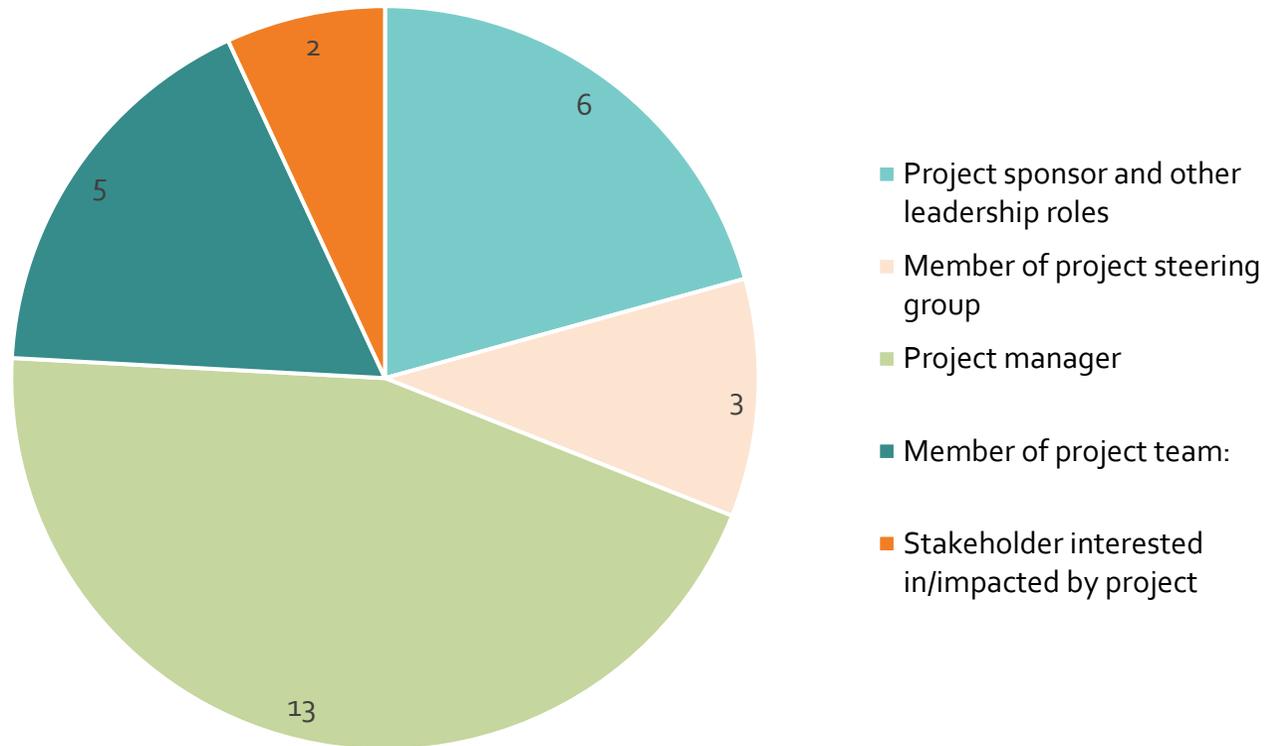
How to raise your hand: Click on the icon labelled 'Participants'. Click on your name and select "Raise Hand". You may have to click the screen to access the menu.



Feedback on the survey



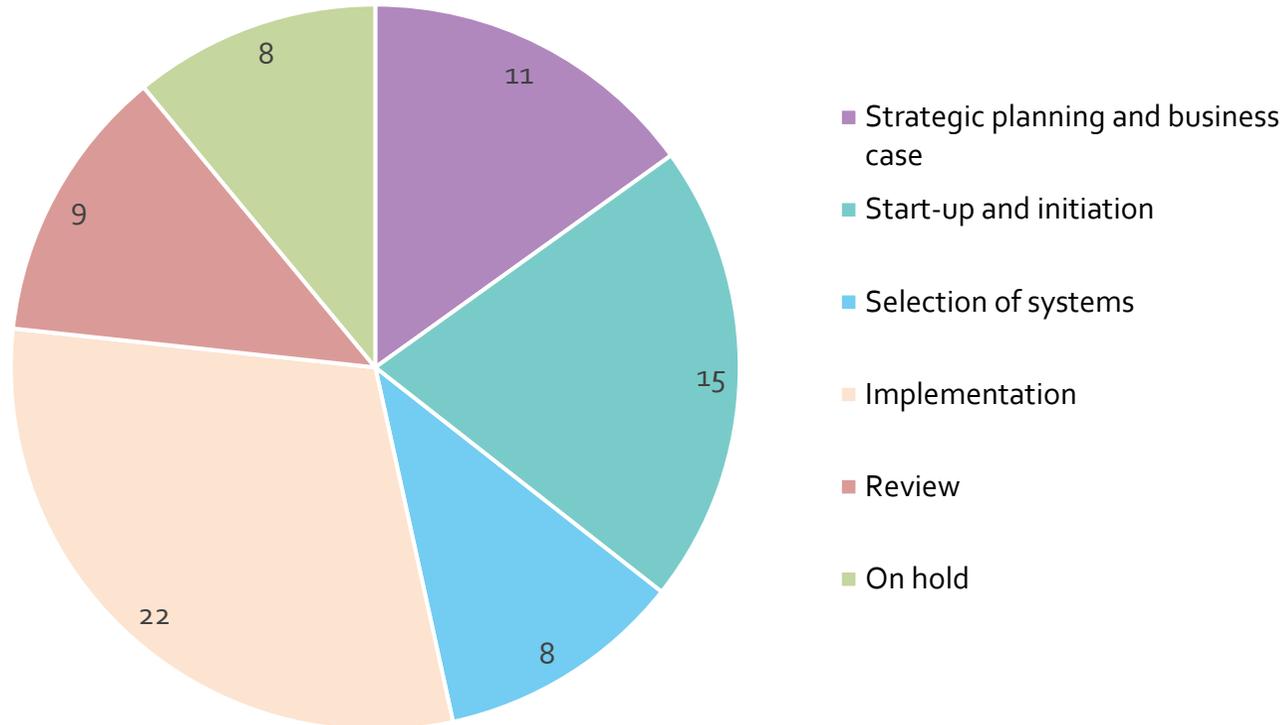
Q1: What is your main role in projects in your organisation?



Q2: What projects are you involved in currently (*tick all that are relevant*)?

CRM	12
Grant management	5
Case management	5
Finance	11
HR	4
Infrastructure	8
Data management, document management	3
Learning management	4
Digital, communications, website	5
Other	4

Q3: What stage are your projects at?



What are you looking for from this session?

- Learning from others' experiences
- Understanding techniques others have learned for managing projects remotely
- Looking at the key roles in projects
- Gathering tips, tricks and best practice

Introductions



What are the main challenges you're facing?

- Uncertainties about the future – external and internal
- Virtual project managing
- Managing (limited) resources across various projects
- Introducing project management to the organisation
- Managing expectations – time, cost, deliverables...

Key challenges to address

- Governance and management – project sponsor and project manager
- Role of project manager
- Business case, rationale and budget
- Project approach

Salesforce Redevelopment at National Children's Bureau (NCB)

Lauren Weller – Salesforce Principal Officer



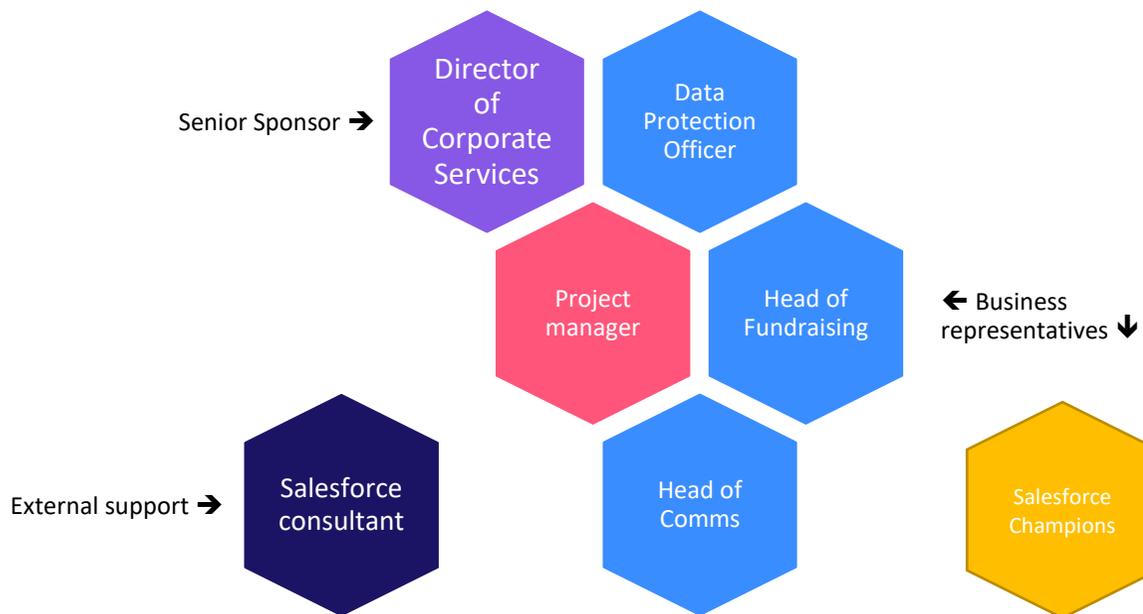
NCB: United for a Better Childhood

- Our mission is to build a better childhood for every child:
 - Use evidence to influence policy change
 - Bring people and organisations together
 - Develop the workforce
 - Amplify children and young people's voices
- NCB Family:
 - Anti-Bullying Alliance, Childhood Bereavement Network, Council for Disabled Children

Our Salesforce story

- 2013-2017 – History of failed implementations mean the system was drifting and suffering from various technical and cultural issues
- 2018 – As an existing staff member, I took on a small (0.2 FTE) role with the aim of assessing the current situation, making minor improvements and recommending next steps
- 2019-now – Redevelopment project resourced by a internal Project Manager (0.8 FTE) and Salesforce Development Partner

Salesforce Project Team



Right for the role?

- Project management experience but not qualifications
- Salesforce experience but not qualifications

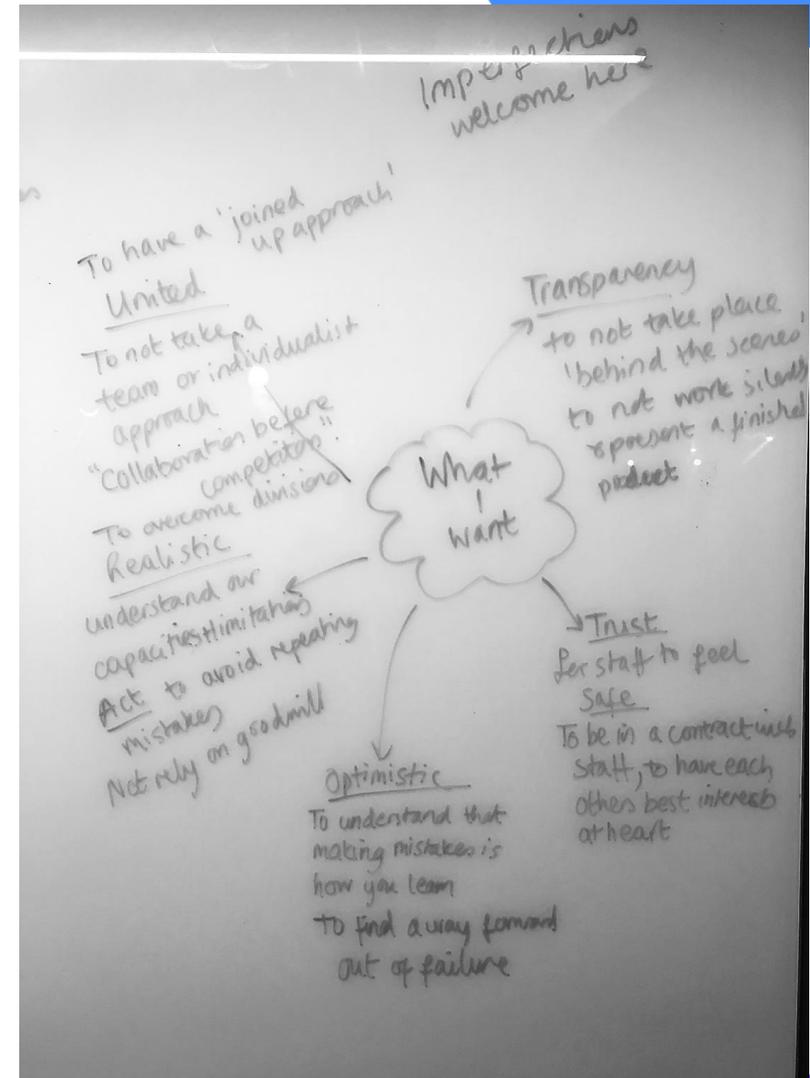
- Insight into NCB dynamic
- Existing relationships
- Commitment

This worked #1

- Taking time to set a project **vision, aims, success measures** and **values**
- Consistent structure for planning and reporting
- Keep me focused and motivated (why am I doing this?!)
- Support change management by clearly showing where we are going, why and how close we are

Values into practice

- Champions group: all champions represent all staff (not team based)
- Regular internal newsletter and all staff meeting slots
- Share challenges honestly and early
- Project relentless confidence and optimism



Could have been better #1

- Initial scoping did not clearly articulate what the project would deliver and underestimated the effort required
 - NCB reduced scoping days to cut costs
 - NCB rushed sign off of 'statement of work' to fit fiscal year deadline
 - Developer project lead was inexperienced and not given proper oversight
 - Developer staffing changes created a disconnect between initial scoping and later project management

This worked #2

- Talking and listening to teams and individuals **often**
- Showing that I will always be there and I will never give up on them
- People put up barriers – they will be busy, they will tell you to your face they don't care about the project – keep pushing
- Eventually, someone you thought you would never win over will be the first to meet a deadline :D

Could have been better #2

- High workload + high pressure to deliver = low wellbeing
- When developer capacity ran short, I picked up their technical work
- I had colleagues to advise but no one to share tasks with
- I cared too much and felt solely responsible for delivering

Where are we now?

- 'Phase 1' system launched in March 2020
- Efforts to fully embed the system ongoing until March 2021 (extended due to Covid 19)
- Initial planning for future phases of development are starting
- CRM development has stimulated, and is closely integrated with, an emerging digital strategy for the organisation

GRAB A COFFEE before Breakouts



Breakout Room Discussions



- 1. What changes have you had to make in running projects in your organisation because of Covid and working remotely - and how have they impacted on your project**
- 2. What skills do you think are important for:**
 - the project sponsor
 - project manager
 - project team members**and are there any new skills you've needed because you're working remotely?**
- 3. What are your top project tips and tricks that others might learn from?**

Re-convene for feedback from each group.

Thanks & Goodbye!

Upcoming events...

25 November – Digital Strategies and cake

www.adaptaconsulting.co.uk/adapta-events

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If you would like further information or any advice regarding your own specific issues, then please do contact the Adapta team at hello@adaptaconsulting.co.uk