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ETM 545: PROJECT MANAGEMENT

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Abstract

The report focuses on identifying the challenges faced by the global virtual teams in IT through the literature review and conducting a survey of the team members of involved in the global virtual teams in United Health Group. The report uses the literature research to identify strategies to overcome the challenges and proposes a model that can be used by virtual teams which helps them to guide their path to success.

Introduction

In today's information age, corporations are faced with increased competition and globalization. Project success becomes even more critical to business performance, yet many projects still suffer delays, overruns, and even failure [1,2,3,4,5,6]. This report identifies ways to help improve the management of global projects in IT Departments by specifically addressing the impact of risk management as it is applied to international laws, communication, cultural differences, time zone differences, and procurement issues on said projects.

Literature Review

As companies push to become global players in their respective markets, many corporations fail to consider the impacts of operating in an international environment. Often times, risk management techniques and procedures are used too little or are not utilized a t a l l due to a lack of understanding of how to implement properly [1]. Risk management is the process of responding to an event that offers negative or positive consequence. In risk management, the goals are to maximize the gain from positive risks, often referred to as opportunities, and minimize the loss from negative risks [7].

Challenges of Risk Management, International Law and Procurement in Global Virtual Team:

[7,8,9,10,11] gives insight and definitions of some of the challenges faced by project managers in an international projects team environment:

● *Turning Diversity into synergy* - By definition, these international projects involve a mixture of people from differing countries. Getting the project team to produce something greater than the sum of its parts can be a challenge, especially if the differences are not considered or managed very well. *Typical Risk:* unclear/undefined responsibilities, unmanaged conflict, little or no interaction among team members.

- *Effectively achieving goals and objectives* - Global projects, by definition, are geographically dispersed. It can be difficult, at best, to maintain focus on goals and objectives. Activities can arise that can easily cause a lack of focus due to them being outside of the originally defined scope, leading to a final product that fails to meet the customers' needs by, again, allowing scope creep to come into play. *Typical Risks: scope creep, no prioritization of change requests.*

- *Efficiently applying resources* - Many different variables exist that can actually cause global IT projects to operate inefficiently. These variables include differences in work ethics, legal issues, and role expectations. *Typical risks:* inadequate feedback on schedule or cost performance.

- *Achieving harmonious activities* - Planning an in-country project vs. a global project requires a different set of skills and experiences. Because of geography, cultural differences, and communication difficulties, getting a diverse team to transform into a high -performing team can prove difficult. Harmony can quickly turn into chaos, especially if a team lacks homogeneity in race, culture, or religion. *Typical risks: conflicting development standards, widely divergent working styles.*

- *Establishing and maintaining communications* - A common problem in traditional in-country projects, can be exacerbated by distance, time zones, language, etc in an international setting. Sever time zone offsets beyond eight hours for a typical workday makes it difficult to coordinate actives

collaborations by conventional means of communicating such as unplanned meetings or telecommunicating. Differences in culture can lead to miscommunication-not just through words, but also ideas. Considerable "noise" arises that interferes between team members from different countries, such as the impact of body language and the way one presents themselves (dress/behavior). *Typical risks: no information sharing, poor communications of decision.*

- *Finding collaborative solutions* - Collaboration among individuals of the same culture is difficult enough. One can easily imagine the greater difficulty had by trying to get people from different cultures to collaborate. Differences such as language, values and perceptions can be attributed to this phenomenon. The opportunity for collaborative mistakes, such as miscommunication, negative conflict, and mistrust increases. *Typical risks* - no interaction among team members, an inability to cross language barriers.

- *Building and maintaining trust* - As globalization progresses, the history of relationships among different people does not disappear in sync. Memories of war, sectarian struggles, and religious animosities can easily surface and destroy project unity. Certain nationalities may find it very difficult to work with others, including and often times Americans. A history of mistrust can interfere with activities such as communicating and delegating responsibilities. *Typical risks - border tensions between countries.*

- *Overcoming cultural differences* - Differences can be strengths or weaknesses. Different strengths can contribute innovative solutions to problems and different insights on issues. Differences in weaknesses can cause problems for the team, such as causing a lack of focus, failing to manage conflict, and not sharing information. The inability to manage this often leads to an inability to cope with other challenges. *Typical risks - slow learning curve, inability to agree on priorities.*

- *Building cross-boundary teams -* Most projects involve crossing multiple boundaries. This fact is difficult not only for overcoming tangible obstacles, (i.e. legal and regulatory requirements), but also for implicit ones (i.e., customs regarding interactions). Overcoming such barriers is necessary to achieve synergy. *Typical Risks - b*order tensions between teams.

- *Achieving cross-fertilization of ideas -* Miscommunication, mistrust, and misperceptions can result in people not sharing ideas or communicating basic information or exhibiting intolerance. Failure to deal with this can hinder creativity, which, in turn, impacts the quality of results. *Typical risks - conflicting development standards, no versioning of objects or modules, poor communications of decision, poorly articulated requirements.*

- *Maintaining security -* Security issues are one the major challenges because the control over global companies is difficult at best as distance and complex international laws are applied. Ensuring proper control of proprietary information or personally identifiable information is paramount.

Typical Risks: trade barriers, release of personal data to unauthorized people.

● *Adapting to international tensions -* Socio-political and economic events can also pose a significant challenge. At one moment in time, relations with a particular country can be positive; at others, totally negative, thereby interfering with project performance. *Typical Risks -trade barriers, border tensions between two countries, political instability, and historical animosity between cultures.*

Challenges of Communications in a Global Virtual Team:

Global Virtual Teams are gaining popularity over time and we see more and more global teams in organizations today. Global Virtual Teams are dispersed across the space, time and boundaries. Global Virtual Teams are internationally distributed groups of people with an organizational mandate to make or implement decisions with international components and implications. They are typically assigned tasks that are strategically important and highly complex. So, Effective communication plays an important role in the global virtual team's performance. Communication is necessary in assigning goals and tasks, and coordinating work among team members who are spread around the globe and in different time zones.

The global virtual teams have very little face-to-face interactions with the team members. They utilize the computer mediated communications to communicate

with the team members. These include Video- Conferencing, emails, chats, fax and SharePoint sites to share written documents and information. Even the with the use of advanced communication technologies available, the global virtual teams still face challenges in communicating. The three major challenges are

1.   The first challenge is to compensate for the lack of face-to-face interactions. Online communications inhibits the trust among team members and also inhibits the sense of responsibility and participation of the team member in the team.

2.   The second challenge is to build trust and a working relationship among the team member who have never met before personally.

3.   The third challenge is to effectively tap the knowledge of each team member to achieve goals and objectives of the team effectively [14].

Challenges of Time zone in Global Virtual Team:

The growth of international business has created a spread of globally distributed work, especially into developing regions of Asia, has project teams that work across time zone differences. Increasing global economy fuel the dispersion of offshore work and creation of multi-national teams. Severe time zone offsets beyond eight hours for a typical workday makes it difficult to coordinate active collaborations for conventional means of communicating such as unplanned meetings or telecommunicating. More research needs to be completed to find

how global teams are utilizing new video and social networking tools. Email is understandably still the most prevalent method of communicating internationally. Besides geographic distance, there are other factors surrounding issues with communication. Multinational and multicultural factors exist among different geographic sites. In addition to the multicultural factors, communication style, conflict resolution, and time add to the differences in distances that global teams must cope with. Focusing on software development projects, the following major take-away points are shown below:

- On average, projects distributed in two locations expended about 28% in overhead costs while projects in three locations expended about 25% overhead costs

- Large time zone differences are geographic locations that greater than 9 hours apart and medium and short time zone differences are locations that are 5-7 hours and 0-3 hours apart.

- The amount of communication in two-location projects is higher than the amount of communication in three-location projects

- More communication in small time zone range

- The reply time for emails is faster in small time zone range than large time zone range

Project Overview

UnitedHealth Group (UHG) acquired a company called PPC Worldwide (Positive People Company) based in Oxford England in 2009. This company is a behavioral services company providing Employee Assistance Programs (EAP) and Wellness programs worldwide. PPC is a company consisting of four acquisitions itself around the globe; Canada, Australia, India and Brazil.

As a part of UHG's standard mergers and acquisitions (M&A) process each physical location of PPC offices is connected to UHG's wide area network (WAN). In addition all computers will be exchanged for standard HP models supported by UHG's remote desktop support group (RCO). All telephones will be replaced with standard Cisco devices and all network circuits moved to UHG's Telco vendors.

The reason for doing this is to align the acquisitions under UHG's Information Risk Management policies, which protect member data by leveraging strict technical controls. UHG's perspective is that no matter how small the company or how low the risk, any information security breach is a direct reflection on UnitedHealth Group and is unacceptable.

The project was funded at 1.4 million dollars, which covered the equipment and labor necessary to perform this integration. This is a process that UHG has undertaken dozens of times for US based companies and has a set process/plan to accomplish this effort.

General high-level

steps:

1. Implement IRM policies for computer encryption on legacy acquisition computers.

    a. IRM remediation

2. Operating system patching to meet IRM standards

    a. IRM remediation

3. Implement IRM policies regarding email encryption.

    a. IRM remediation

4. Penetration testing of all externally facing network devices

    a. IRM remediation

5. Penetration/vulnerability testing of all externally facing applications.

    a. IRM remediation

6. Source code vulnerability scanning of all externally facing applications.

    a. IRM remediation

All of these steps are short-term efforts to remediate risk to the existing infrastructure across the acquisition. This is done because the timeline to complete the integration can take 1-3 years.

The next step is network integration, which consists of connecting the acquisitions network to UHG's network ultimately resulting in what they call "trusted state".

Network high-level

steps:

1. Order network equipment to connect the acquisition to the UHG network using MPLS.

2. Order redundant network connections based on UHG policy for each major location.

3. Order an Internet gateway for each major location.

4. Install and configure devices and connect to existing PPC network in an un- trusted state. The users under UHG's domain cannot access PPC's domain and vice versa but given appropriate credentials you could log into each domain on the network separately.

5. Provide each PPC user with an UHG domain credentials and security device.

6. Create a trust between the domains that allow users to authenticate directly to either domain and enable PPC users to access some UHG based network services directly.

   At this point all users are still using their legacy PPC computers and are supported by their local IT staff. The next step is to move each user to a standardized UHG HP model and software image that is support by RCO.

Desktop migration high-level

steps:

1. Identify all applications the business needs to use locally or access remotely on the UHG image.

2. All applications that are loaded directly on the image need to be tested and approved by UHG prior to being added to the image.

3. All of these applications that are built/supported by the PPC IT teams need to pass additional IRM reviews.

    a. IRM remediation

4. The business needs to identify what classification of machine each user needs to perform their duties: desktop, laptop, developer laptop, etc.

5. Once all of this is approved and equipment received, UHG sets up a process by which to migrate users to new machines over the course of a number of weeks. They hire contractors to perform the migrations at night and then support the users the next day if any issues arrive.

6. UHG sends contractors to remote offices to assist in the migration in all locations.

7. For those users who work remotely not in an office they are shipped a machines and supported remotely.

8. At this point in the migration, local PPC IT staff does not have the ability to support these machines anymore and the users' needs to call a helpdesk number and receive support remotely by RCO.

The final portion of this project is to standard all phone capabilities to UHG standards. This is swapping out existing phones for Cisco VOIP phones and replacing existing circuits for all locations to UHG standards. In addition all call center functionality is moved to leverage UHG's Virtual Call Center technology (VCC) to provide consistent capabilities and reporting.

At a high level this is what the project consisted of and it is 90% complete. The outstanding pieces are:

1. Desktop migration for UK staff (underway)

2. Phone system changes

a. APAC planned to be completed by end of Q2. 7 locations.

b. UK can't be done until desktop migration complete

3. VCC migration

a. UK and APAC underway. Considerable hardware/network work needs to be completed to enable this technology.

The goal is to complete this work in 2013.

As you can imagine this type of project is difficult enough if it was done across US locations. When you add in the international locations it becomes much more difficult.

1. All equipment needs to be purchased in country because of international tax laws.

2. Some of UHG infrastructure cannot be used because of international data laws that do not allow ANY data containing personal health information (PHI) or personal identifiable information (PII) to be stored in the US. The patriot law made this even more of a concern for some countries. An example of this is email, which requires each region to continue to maintain their email systems instead of migrating users to the US, based infrastructure.

3. Each regional business funded the local IT work required by UHG for this integration. The integration work was in addition to their continued support of each regional business.

4. Time zones caused issues with communication.

5. Regional IT not reporting to UHG IT caused prioritization issues and delays in the project.

6. This being UHG's first integration into Australia caused issues because UHG wasn't prepared to support it as well as the UK for example which already had some UHG capabilities.

7. Singapore, Hong Kong and China presented additional issues because of location and in the case of China, government laws.

8. The resulting UHG IT services which are charged back to each business is substantially higher than their previous services. This is mainly because the level of security and services is much higher than the business previously supported. But this resulted in a negative financial business impact to their P&L.
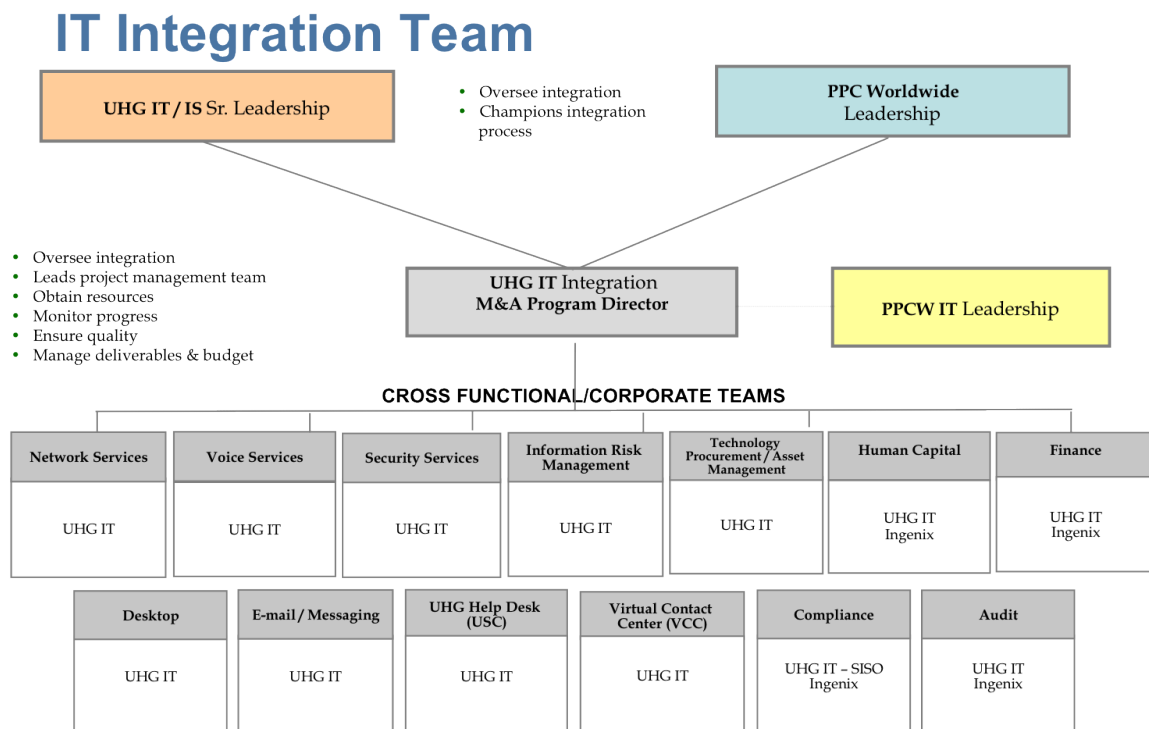
UHG Program Team

Figure 1: UHG Integration Team

This integration project touches almost all functional areas across UHG IT. The structure for this project is to put a Program Manager in place to lead the project across all functional areas. Each functional area can have a project manager assigned to the project if the scope of their work requires direct management.

As the project moves through the integration process the program manager prior to their involvement schedules the groups involved in that phase. This allows the functional manager to administer their resources because multiple integration projects for different acquisitions can be underway at the same time. Without the resource-planning step, projects would get bottlenecked as they compete for resources.

Integration Approach

The work breakdown structure for the project separates it into five phases. Each phase interacts with individuals and teams from the business and UHG functional areas. The phases are aligned, as dependencies and a subsequent phase will be delayed indefinitely until the predecessor is completed.
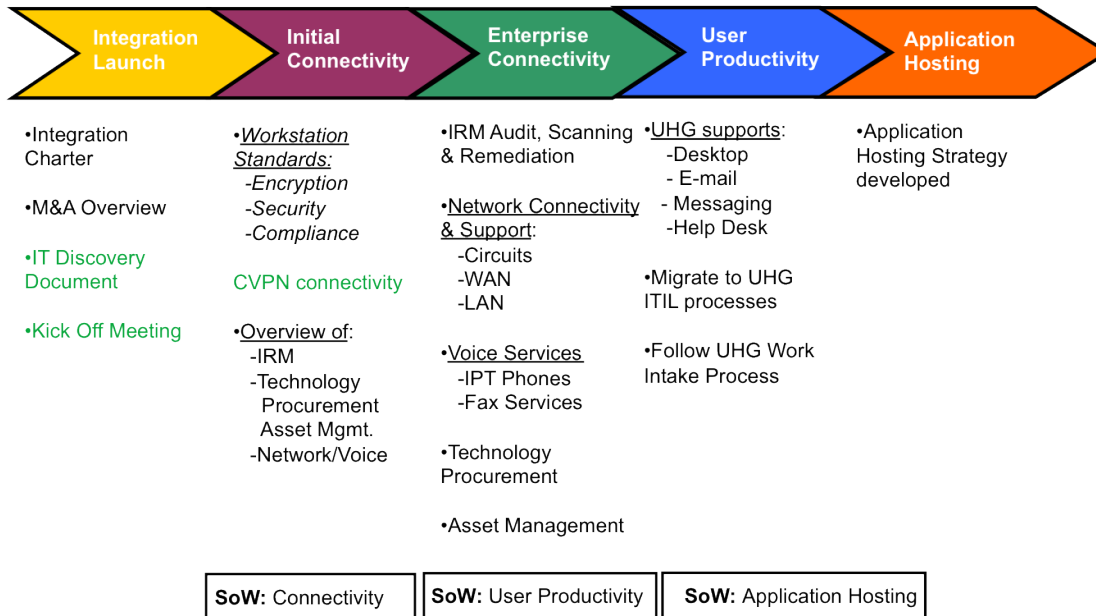
Integration Approach

Phases

Figure 2: Integration

Approach

As noted there is heavy involvement from the acquired business and their IT staff. Given there is business specific infrastructure and application knowledge that requires business IT participation for the action to be completed successfully, the business's IT team can quickly become the resource constraint.

All of the business units had a minimal IT staff that was continuing to maintain the business critical systems as well as being required to complete UHG integration tasks. This conflict resulted in the majority of the project delays.

Project Challenges

This integration process was designed and applied to US based companies prior to the integration of Optum International. Integrating international companies posed considerable challenges and resulted in problems the US based project managers didn't take into account. These challenges and problems were discovered through the use of a survey that was distributed to several members of the project team. Figure 3 shows how much of an impact respondents felt international law played into the overall project solution and success.

Figure 3. Impact of regional/country specific laws on the project's solution.
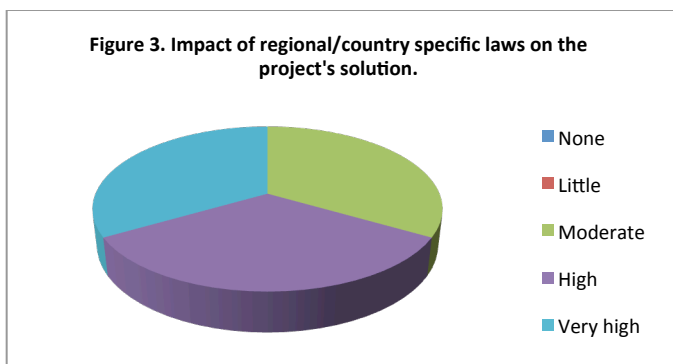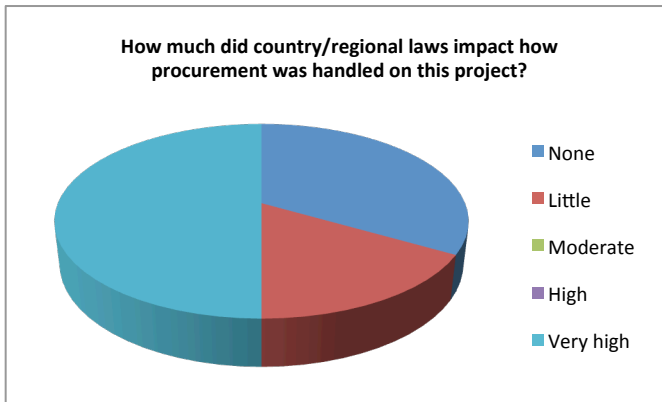
International laws

1. Data protection - different regions and countries around the world have degrees of laws designed to protect an individual's private information. In

the United States HIPPA is used to protect Protected Health Information (PHI) and Protect Identifiable Information (PII) and is a guiding policy at UHG. Similarly the UK and Australia have comparable laws which for this project meant that all data

Captured in support of the behavioral services we provide need to be kept in country. This meant that infrastructure housed in data centers in the USA could not be used for this integration project. That resulted in a considerable scope change to handle this requirement.

2. Tax accounting – for US based acquisitions, UHG procurement would purchase the infrastructure necessary to complete the integration. UHG would then depreciate the cost using US based accounting rules. For international companies the purchases needed to be done in country which meant the local business needed to incur the cost which was significant and wasn't budgeted.

Exploring this further, Figure 4 shows the impact respondents felt international law played into procurement of resources needed for completing the merger operations.

How much did country/regional laws impact how procurement was handled on this project?

- None
- Little
- Moderate
- High
- Very high

Procurement

1. Regional procurement – as noted above, tax accounting laws required infrastructure to be purchased and accounted for in country. This changed the procurement model and presented challenges the project teams weren't prepared to address efficiently. In the case of Australia, no UHG approved procurement partner had been identified which led to considerable delays in the acquisition and implementation of equipment.

2. Localization – the infrastructure to support the integration had minor differences (power adaptor) that were easily handled during the procurement process. There were issues involved in getting the correct operating system installed (UK versus AUS versus US) on the computers/servers as well as keyboard issues given keyboards are different across countries/regions.

3. Support services – UHG uses vendors for the installation and configuration of infrastructure as a part of the implementation phase. Again procuring an approved vendor to provide these services meant the project

team had to find and complete contract negotiations with regional vendors which wasn't part of the implementation plan.

An essential part of global project teams is the ability to communicate as effectively and efficiently as possible. Survey respondents were asked to provide the impact that four types of communication had during this project and the results are shown in Figures 5a. – 2d.
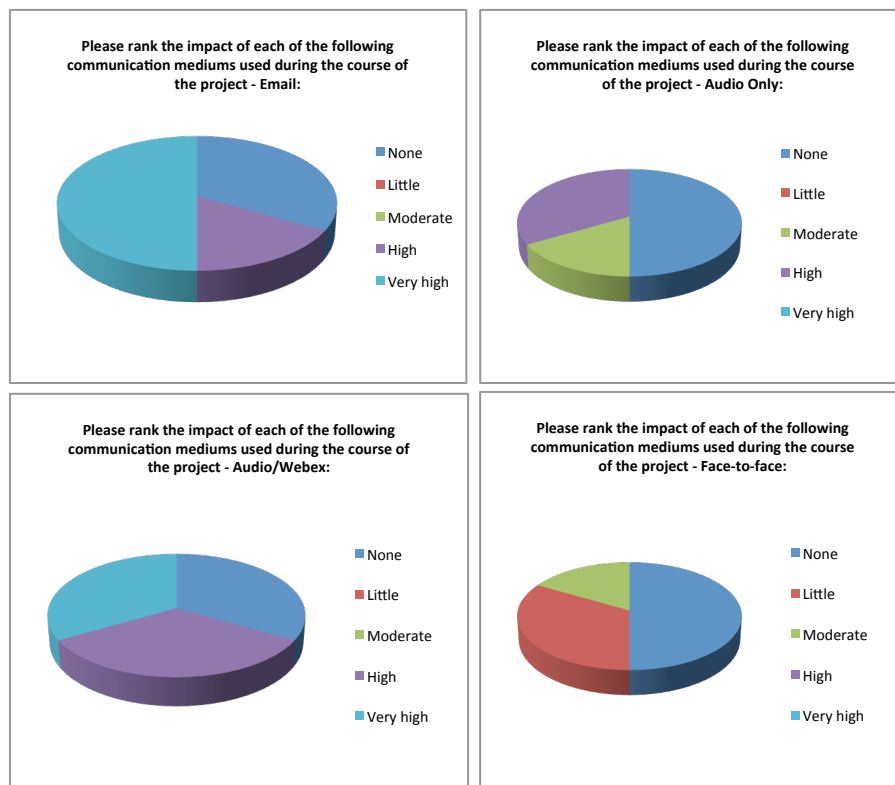
Communication

Given the size of this project team and the geography boundaries it spanned, the medium of communication used was important to the success of project meetings and general decision-making activities.

1. Email – as already noted, this was the primary mechanism for project coordination and decision-making early in the project to counteract the time zone meeting issue. It had limited success simply by the nature of email communication but also because of the time zone issue discussed above and ability for emails to be ignored or lost by the recipient.

2. Voice conferences – group discussions and decision-making activities requiring interactive participation. Most meetings were successful if they followed the process of clear communication as to the purpose of the meeting, intended outcome/decision and action items. Typical failure of these meetings was the lack of participation of the right leader to make a critical project decision.

3. WebEx/Voice – used to discuss documentation and/or collaborate around a project artifact. Typically good success if the meeting was structured and well planned. Face-to-face – this meeting type was used only occasionally because of the cost of international travel. It was reserved for multi-day agendas comprised of technically or business complex problem solving. These had the most success of all meeting types but the time zones and participants' ability to deal with related jet lag did impact some meeting outcomes.

Time zone

UHG IT headquarters are located in Minneapolis Minnesota which is -6 hours from London and +9 from Melbourne (during daylight savings time). These time zones provided the following challenges:

1. Meeting time coordination – most meeting were schedule at times friendly with Minnesota central time. This meant that London participates were meeting late in their day and Melbourne participants were early. Although for the most part this worked okay, it put stress on the regional teams given the extended hours.

2. Delay in email response – a significant communication issue was caused by the inherent delays associated with the time zones and when a participant received and responded to emails. If an email was sent to the UK by UHG later than late morning, it wasn't until the following day US time that the email was responded to at the earliest. It quickly became clear that voice meetings were necessary for decision making and information gathering to minimize project impact.

Strategies to Overcome the Project Challenges

Risk Management, International Laws and Procurement:

After gaining an understanding of the impact and importance of each risk, the next step is to implement the appropriate risk controls.

Controls can be classified into three categories

1. Preventative controls – which mitigate the impact of a risk of stop it before having an impact

2. Detective controls – which reveal the existence of a risk and preclude future impact under similar conditions
3. Corrective controls – which involve determining the impact of a risk and require establishing measures to preclude future impacts.

The figure below identifies different types of risks and preventive methods to mitigate them.

Goals			
Category: Specific Risk	Not to Exceed $30,000,000	Complete Project by Deceber 31, 2014	Meet Minimum ISO 9000 Standards
Legal: Import and export restrictions	*Preventative*: Hire expretise in international law	*Preventative*: Hire expretise in international law	*Preventative*: Hire expretise in international law
Legal: Political instability	*Preventative:* Purchase political risk insurance	*Preventative*: Consider alternative offshore vendor sites	Not applicable
Behavioral: Culture Shock	*Preventative*: Train people on cultural issues	*Preventative*: Train people on cultural issues	Not applicable
Behavioral: Divergant working styles	*Preventative:* Train people on conflict management	*Preventative*: Adopt an infrastructure that encourages collaboration, coordination, and integration	*Preventative:* Train on ISO 9000 requirements
Behaviroal: Language difficulties	*Preventative:* Train people to learn a language; hire translators	*Preventative:* Train people to learn a language; hire translators	*Preventative:* Train on ISO 9000 requirements
Managerial: Little or no project management practices in place	*Detective:* Conduct frequent audits of offshore vendor site	*Detective:* Conduct frequent audits of offshore vendor site	*Detective:* Conduct frequent audits of offshore vendor site
Managerial: Lack of available expertise	*Preventative:* Train on specific skills	*Preventative:* Train on specific skills	*Detective:* Encourage review of deliverables

Communication:

Following are the strategies to overcome communication challenges

1. Having face to face meeting whenever possible. These meetings help in developing team cohesion and bonding among team members which help them in tackling complex and challenging group tasks.

2. The Face-to-face meetings can be held once in 2 or 3 months initially to inculcate the sense of responsibility and working relationship in team members and later be held once in 6 months or once in a year. The team can make use of the computer mediated communications and phone to communicate with the team members between the face-to-face meetings.

3. The effective GVTs follow a deep rhythm of temporal patterns in communication with face to face meetings happening at regular intervals and substituting them with the online communication between the intervals. They

must review and assess their communication strategies and patterns regularly
and see if they are working effectively or not.[12]

4. When using the online communication, the team members should avoid the

   usage of local jargons and acronyms to make the message the clear and

   understood by all team members. The team members should also use the

   communication technology that is accessible to all the members of the team

   and should be comfortable using it.

5. By recognizing the cultural patterns and expectations and adapting to the
   spoken and written messages, the GVTs, which are also cross cultural teams
   can improve interactions which in turn improve the performance of the
   teams.[13]

6. The use of sound and good project management techniques can provide a
   means to clarify the goals and objectives and progress towards the team's
   success despite of the communication challenges.[14]

Time Zones

The main strategies for solving the uncertainty and ambiguity considering time
zones in global virtual teams include:

1. Extensive emailing
2. Traveling to face-to-face meetings
3. Extending workdays to collaborate simultaneously across time zones
4. Establish a skewed workday (i.e. allowing someone to start their day late in the
   day to get off later or vice versa)

Conclusion:

From the survey distributed to several team members of the project team and
literature review on the challenges faced by the global virtual teams, we were able
to identify the above challenges faced in general by most of the global teams and
ways to mitigate or overcome these challenges. From the study, we would propose

the below model for the global virtual teams success by overcoming these challenges.
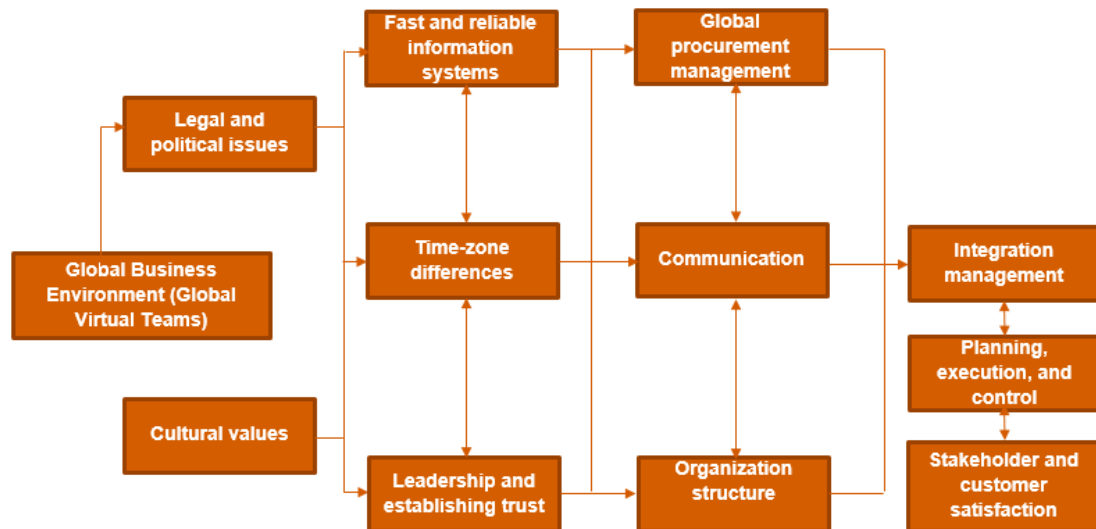
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Appendix

Below is the Survey Questionnaire sent out to the team members of the project team:

Sample Survey Questionnaire

International Project Survey

Portland State's Engineering and Technology Management program requires each student to take Project Management 545 as a part of the curriculum. A requirement of the course is for teams within the class to identify and evaluate a project to understand the impacts to the project that are either inherent to project delivery or unique to a project based on project requirements.

Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will very but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1. What is/was your functional role on the project (title and responsibility)?

    Approximately how many weeks were you involved in the project?

2.	What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1.

3.	How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

	If 3 or greater please explain:

4.	How much of an impact did language difference have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

	If 3 or greater please explain:

5.	Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a.	Email
b.	Audio only
c.	Audio/Webx
d.	Face-to-face

	If 3 or greater please explain:

6.	Please describe the frequency and mediums used for communication across the project team.

a.	How were project issues communicated to business and technology stakeholders?
b.	What was the most common cause of project issues that needed to be communicated to stakeholders?

7.	Did regional/country specific laws impact the project's solution? (Yes/No)

If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

In no, please explain:

8.   Describe how resources were allocated and managed across the project.

How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

9.   Describe how procurement of equipment was handled for the project.

How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

10.   Describe how the project was funded and the process by which the financials were managed.

How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

11.   Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

12.   Based on your perspective please rank the projects success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a.   Scope/requirements
b.   Budget
c.   Time/schedule

Additional comments:

Feedback from IT Technical Consultant:

International Project Survey

Portland State's Engineering and Technology Management program requires each student to take Project Management 545 as a part of the curriculum. A requirement of the course is for teams within the class to identify and evaluate a project to understand the impacts to the project that are either inherent to project delivery or unique to a project based on project requirements.

Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will vary but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1. What is/was your functional role on the project (title and responsibility)?

   IT Technical Consultant

   Responsible for liaising and communicating at a technical level the information and knowledge (from a local level) required to implement the acquired organization IT into the parent companies infrastructure.
   The second part of this responsibility was to implement technical solutions on behalf of the parent company whilst finding ways to allow the acquired company to operate in a new architecture whilst still allowing legacy systems to continue to operate in the new environment.

   Approximately how many weeks were you involved in the project?

   18 months (original involvement to project closure)

2. What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1.

Melbourne, Victoria, Australia UTC+10

3.   How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

        If 3 or greater please explain:

4.   How much of an impact did language difference have on the success of the project (1 – none, 2 – little, **3 – moderate**, 4 – high, 5 – significant)?

        If 3 or greater please explain:

        The overall success of the project remained unaffected by language differences – with all project teams' primary delivery language being English.

        The one impact did come when knowledge/questions was transferred/asked from employees whose first language wasn't English - confusion was often occurred in the project team when what was understood, was different to what was said.

5.   Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a.   Email (5)
b.   Audio only
c.   Audio/Webx (4)
d.   Face-to-face (3)

        If 3 or greater please explain:

        For day to day decisions and questions email was the most significant player in communicating between project teams. This was largely a result of the different time zones and keeping different team members updated with changing status.

Audio/WebEx was an effective medium for weekly status updates, whilst communicating both verbal and visually what was being discussed. This also allowed for an environment where questions could be raised or tasks not actioned could be followed up.

Face-to-face communication played a key role in communicating and establishing the trust/relationships with the parent company (and the associated IT project), particularly in assisting the business to understand the reasons behind the project, the benefit and justification for the large expenditure.

6. Please briefly describe the form of communication used to communicate project issues to business and technology stakeholders. Please give the frequency for each type of media used.

An IRAAD (Issues/Risks/Actions/Assumptions/Decision) was the most regular format used to communicate project issues to the project team, and technology stakeholders. This was followed by a regular weekly meeting to go through and discuss all items in the IRAAD.

It was intended that senior IT stakeholders communicated back to business leaders.

7. What was the most common cause of project issues that needed to be communicated to stakeholders?

The biggest cause of project issues that needed regular communication to business stakeholders (occurring frequently) were when business leaders (non-technical) misunderstood the changes being made in an ICT setting, and as a result what the impact would actually be from a business standpoint.

8. Did regional/country specific laws impact the project's solution? (Yes/No)

If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

Another key factor was the geographical distance between continents that affected the projects final solution – compared to a "standard" US centric solution.

In no, please explain:

9.   How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, <mark>4 – high</mark>, 5 – significant)?

Being in Australia and no existing vendor relationships established there was an issue with organizing skilled labor vs. project time frames. The other issue was the physical geographical distance between different sites in the one country, and time zones.

10.   How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, <mark>5 – significant</mark>)?

Procurement was one of the biggest struggles particularly around how equipment procured internationally was paid for, accrued on local ledgers, who carried the associated deprecation budget, and as a result who was the end "owner" of the assets.

From a cost center in retrospect whilst equipment could be procured relatively cheaper in the US - the time shipping, custom clearance and taxes were paid the cost increased.

11.   How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, <mark>5 – significant</mark>)?

12.   Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project?

The corporate culture (of the acquired company) particularly around data security and IT expenditure impacted the attitude of the business towards the integration project, and as a result the support and take up. The parent company having a particular pride on its reputation and importance on security (this having a financial cost of installing associated infrastructure to protect) was not understood by the local business – a

business that traditionally hadn't made large investments in ICT. There conception was that the current process at cost X works, why there is a requirement to spend 4 X.

13.   Based on your perspective please rank the project's success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a.   Scope/requirements

i.   (1)

b.   Budget

.   (3) – Had existing relationships been established in country, it would be assumed that the project's cost could have been greatly reduced.

c.   Time/schedule

.   (3) – The projects inception to closure was long – however this wasn't 100% the fault of the project, but rather the ability for a business to adapt to such great change, whilst the project team implementing a solution in a new country.

Additional comments:

Feedback from Infrastructure Integration Program Manager:

International Project Survey

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Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will vary but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1.   What is/was your functional role on the project (title and responsibility)?

Oversight and management of infrastructure integration programs.

Approximately how many weeks were you involved in the project?

To date – Approximately 60 weeks

2.   What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1.

I am located in Minneapolis (CST). Locations of businesses – UK, Australia (Melbourne), Western Canada, and India (Bangalore)

3.   How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

If 3 or greater please explain: 4

It is difficult to work with all 4 countries with upwards of 50 people engaged in 4 distinct time zones. Additionally, myself and other key members of the program, have never actually travelled to the 4 locations and met the internal customers face to face. Without this interaction, we struggle with overcoming cultural differences, managing through issues, and driving to resolution in a timely fashion.

4.   How much of an impact did language difference have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

If 3 or greater please explain: 1 – Everyone speaks English.

5.   Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a.   Email - 5
b.   Audio only - 4
c.   Audio/Webx - 4
d.   Face-to-face - 2

If 3 or greater please explain:

We attempt to solve many complex issues via email. As the Program Director, I typically try to schedule audio/webex meetings once an email thread becomes too long and convoluted to resolve. Additionally, I try to queue these issues up for discussion during weekly status calls.

6.   Please briefly describe the form of communication used to communicate project issues to business and technology stakeholders. Please give the frequency for each type of media used.

Weekly meetings along with a report containing status, milestones, issues, risks, action items, decisions.

7.   What was the most common cause of project issues that needed to be communicated to stakeholders?

Typically, these were technical issues. The international privacy laws in all 4 countries have forced us to procure and host technology in country. Traditionally, we have hosted almost all technology in the United States.

8.   Did regional/country specific laws impact the project's solution? (Yes/No)

If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

In no, please explain: 5

Typically, these were technical issues. The international privacy laws in all 4 countries have forced us to procure and host technology in country. Traditionally, we have hosted almost all technology in the United States.

9.   How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

4 – We typically have a difficult time forecasting the resource impact on the business' IT resources. Additionally, these groups tend to have limited resources in managing day to day operations. Adding integration responsibilities onto these resources increases burnout effect, and ultimately, turnover.

10.   How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

5 – Equipment had to be purchased in-country. Our procurement model is largely based upon a U.S. model. Additionally, our vendor partnerships are not as strong in country, thus lead times lag. Furthermore, the 2012 Olympics in London was perceived to be a lasting effect on demand/supply of technology assets.

11.   How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

5 – As the project timelines lag, the contract resources continue to bill. Additionally, it is very difficult to forecast budget vs. spend, i.e. we tried to order and receive equipment in 2012 but were unable (see #10 above). This caused budget impacts across years and budget dollars are not transferred year to year.

12.   Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project?

> One of the cultural issues that I see is financial. What is material to the acquired company is simply not material to the parent. Consequently, the acquired entity attempts to drive process changes because of financial impact. However, the parent is unwilling to change based upon lack of materiality.

13.   Based on your perspective please rank the project's success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a.   Scope/requirements
b.   Budget
c.   Time/schedule

Additional comments:

a.   Scope/requirements -
b.   Budget -
c.   Time/schedule -

Feedback from Project Manager for VCC:

International Project Survey

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Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will vary but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1. What is/was your functional role on the project (title and responsibility)?**My role is Project Manager for the VCC (Contact Center) migration**

   Approximately how many weeks were you involved in the project? **I have been in the PM role for a little over a year.**

2. What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1. **I am located in Minneapolis which is in the CST.**

3. How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)? **2-Little**

   If 3 or greater please explain:

4. How much of an impact did language difference have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)? **1-None**

   If 3 or greater please explain:

5. Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a. Email **5**
b. Audio only **4**
c. Audio/Webx **5**
d. Face-to-face **1**

If 3 or greater please explain: **The members of this project team are geographically dispersed so we relied heavily on Audio/WebEx and email to complete project work.**

6. Please briefly describe the form of communication used to communicate project issues to business and technology stakeholders. Please give the frequency for each type of media used.

7. What was the most common cause of project issues that needed to be communicated to stakeholders?

8. Did regional/country specific laws impact the project's solution? (Yes/No) **yes**

If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)? **5**

In no, please explain:

9. How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)? **4**

10. How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)? **5**

11. How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?**3**

12. Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project? **I don't feel this was a significant impact.**

13. Based on your perspective please rank the project's success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a. Scope/requirements **2**

b.   Budget **3**

c.   Time/schedule **3**

Additional comments:

Feedback from The office of CIO Mergers and Acquisition Team:

International Project Survey

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Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will vary but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1. What is/was your functional role on the project (title and responsibility)?
    Provide leadership from Office of the CIO Mergers and Acquisition Team. I represent the acquisition and partner with the business.

    Approximately how many weeks were you involved in the project?
    1 year

2.   What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1.

        I was in CST.

3.   How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

2. Little as they spoke English and the major difference was the time zone and ability to travel there

If 3 or greater please explain:

4.   How much of an impact did language difference have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

None – they spoke English

If 3 or greater please explain:

5.   Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a.   Email - 4
b.   Audio only - 3
c.   Audio/Webx - 5
d.   Face-to-face -2

If 3 or greater please explain:

6.   Please briefly describe the form of communication used to communicate project issues to business and technology stakeholders. Please give the frequency for each type of media used.

Web Ex and audio

7.   What was the most common cause of project issues that needed to be communicated to stakeholders?

Lack of resources at the acquisition

8.   Did regional/country specific laws impact the project's solution? (Yes/No)

        If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

        4 – impacted design of virtual contact center

        In no, please explain:

9.   How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

        4 - high

10.   How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

    Not sure – I did not deal with procurement

11.   How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

    4 – It seemed harder to track expenditures because of currency exchange

12.   Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project?

    The acquired company perceived that the parent company was much bigger, slower and more expensive. It was hard to get the acquisition to buy into the fact they needed to integrate if it was going to cost more to support. This is a common theme across all acquisitions, not just international ones.

13.   Based on your perspective please rank the project's success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a.   Scope/requirements 2 or 3
b.   Budget – not sure
c.   Time/schedule 4 – project has dragged out

Additional comments:

Feedback from Infrastructure Project Manager:

International Project Survey

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Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will vary but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1. What is/was your functional role on the project (title and responsibility)?
- Infrastructure Project Manager – Provide project management for the UK side of the M&A project, liaising with the international project management teams.

    Approximately how many weeks were you involved in the project?
- 28-30 weeks

2.   What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1.

- Location UK, GMT +6

3.   How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

        If 3 or greater please explain:
- 2

4.   How much of an impact did language difference have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

        If 3 or greater please explain:
- 1

5.   Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a.   Email - 1
b.   Audio only - 1
c.   Audio/Webx - 1
d.   Face-to-face - 1

        If 3 or greater please explain:

6.   Please briefly describe the form of communication used to communicate project issues to business and technology stakeholders. Please give the frequency for each type of media used.
- Weekly reports via email were the most common communication method with regular conference calls utilizing webex when presentations where more formal project updates were presented or issues were reviewed by international project teams.

7.   What was the most common cause of project issues that needed to be communicated to stakeholders?
- The nature of the project required a lot of information gathering to scope the work required to migrate users to the new platform. The most common issue was discovering new requirements later in the project which would impact the delivery of

migrations. These often caused further complications or required additional teams to be engaged to identify a solution. Another common issue was the culture change required by the end users when moving from one platform to another and communicating how users could work normally using a new/different set of tools.

8.   Did regional/country specific laws impact the project's solution? (Yes/No)

        If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

        In no, please explain:
- Yes, 3 – UK laws dictate what health data can reside outside of the UK and where connection specific information can be logged. On occasion features that are standard in the US would not be functional for the UK. This required some compromises in the approach taken to complete the project outside of the standard M&A model.

9.   How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?
- 2

10.   How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?
- 2

11.   How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?
- 2

12.   Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project?
- Due to the difference in size between the companies and the parent company, the standard model of integration would not be flexible enough for a smaller entity to function as required. At times there had to be flexibility of how users were setup to keep working productively and meeting the business requirements of the project.

13.   Based on your perspective please rank the project's success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a.   Scope/requirements - 2
b.   Budget - 3
c.   Time/schedule - 4

Additional comments:

Feedback from Project Manager for the OCIO for PPCW:

International Project Survey

Portland State's Engineering and Technology Management program requires each student to take Project Management 545 as a part of the curriculum. A requirement of the course is for teams within the class to identify and evaluate a project to understand the impacts to the project that are either inherent to project delivery or unique to a project based on project requirements.

Please answer each question below by responding directly below the question. For those questions asking for the impact to the project please use the range provided with the question. Depending on your role on the project the impact you perceived will vary but please share all feedback based on your direct or indirect involvement. For questions with multiple parts please answer each separately.

1. What is/was your functional role on the project (title and responsibility)?
    Project Manager for the OCIO for PPCW.
    Approximately how many weeks were you involved in the project?
    I have been on the project for 3 ½ years.

2.   What was your primary location during the course of the project? What was the time difference between your location and Central Standard Time (CST)? For example, PST would be -2 and EST +1.
        Originally, from November 2009 until May 2010, I was located in Connecticut and in the EST +1. Since June 2010, I have been a telecommuter in Florida, same time zone.

3.   How much of an impact did country/regional cultural differences have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

3

If 3 or greater please explain:

Originally PPCW had antiquated PCs, some so old that they needed immediate replacement. We were able to send the UK 10 laptops. Unfortunately, they had U.S. keyboards which needed to be replaced before they could be used. That was a surprise. Data storage rules for the different countries was also a learning experience. We also planned to load all employees for the UK into our employee database system. We didn't realize that most employees had individual work contracts that had to be renegotiated which took almost a year to complete.

4.   How much of an impact did language difference have on the success of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

1

If 3 or greater please explain:

5.   Please rank the impact of each of the following communication mediums used during the course of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant):

a.   Email

1-none

b.   Audio only

1-None

c.   Audio/Webx

1-None

d.   Face-to-face

N/A

If 3 or greater please explain:

6.   Please briefly describe the form of communication used to communicate project issues to business and technology stakeholders. Please give the frequency for each type of media used.

Email and scheduled recurring weekly meetings have been extremely effective in managing the project and the issues.

7.   What was the most common cause of project issues that needed to be communicated to stakeholders?

Lack of resources at the Acquired Entity impacted the ability to complete the project work on time.

8.   Did regional/country specific laws impact the project's solution? (Yes/No)

Yes

If yes, how much of an impact (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

3 - moderate

In no, please explain:

The individual work contracts for employees delayed aspects of the project for almost a year. Also, the UK laws concerning patient privacy, restricted where the data could be stored.

9.   How much did resource planning impact this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

4 - high

10.   How much did country/regional laws impact how procurement was handled on this project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

3 – moderate

11.   How much did country/regional laws impact financial management of the project (1 – none, 2 – little, 3 – moderate, 4 – high, 5 – significant)?

3 – moderate

12.   Given this project was to integrate companies that have been acquired into the parent company how much did cultural differences between the companies impact the project?

As the major countries were the UK, Canada, and Australia, the impact was negligible.

13.   Based on your perspective please rank the project's success across the following criteria (1 – very, 2 – highly 3- moderately, 4 – marginally, 5 - failure):

a.   Scope/requirements – 2 - highly
b.   Budget – 3 - moderately
c.   Time/schedule – 4 -marginally

Additional comments:

What I have personally learned in the 3 ½ years that I have worked on M&A projects is that the makeup of the company, the country that they are located, the type of work that they do, and how the employees interact with the acquiring company, make each acquisition a totally unique experience.