



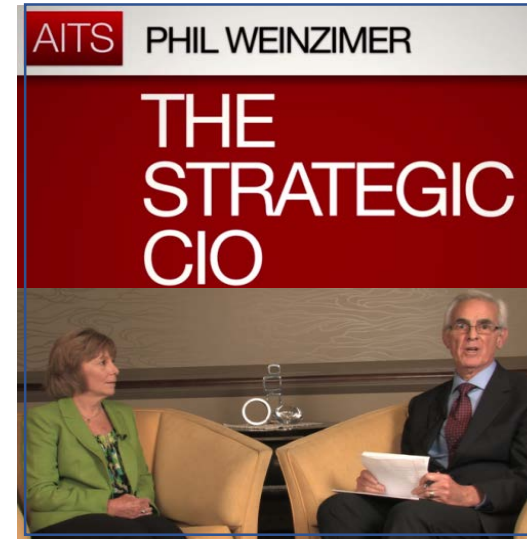
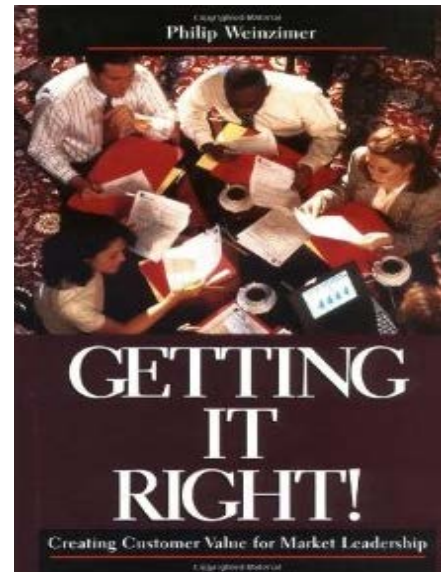
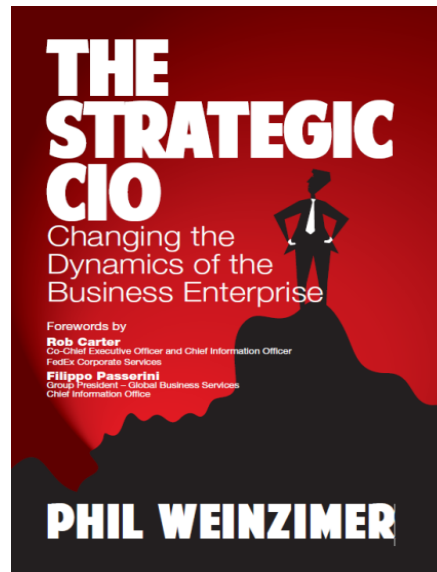
## Case Study

# **How the State of Georgia Implemented an Innovative Governance Process**

Phil Weinzimer  
Strategere Consulting

May 1, 2018

# Phil Weinzimer



AITS

Computer Aid's  
Accelerating IT Success  
**Global Edition**

- **Managing in the 21st Century**  
Phil Weinzimer | April 25, 2014 | 0 Comments
- **What is your Framework for Excellent Service Delivery?**  
Phil Weinzimer | November 08, 2012 | 0 Comments
- **CIO Focus: Paradigm Shift Ahead!**  
Phil Weinzimer | October 04, 2012 | 0 Comments

- **The changing role of the CIO**  
Phil Weinzimer | March 14, 2013 | 0 Comments
- **The Art of Project Governance**  
Phil Weinzimer | February 13, 2013 | 0 Comments

**TRANSFORMING IT FOR BUSINESS SUCCESS** by Phil Weinzimer  
Can Strategic CIOs Create a Renaissance Revolution?  
If you are one of those naysayers who think the title of this blog is not relevant to how CIOs leverage information technology and influence today's boardroom strategies, you are wrong. Just talk to CIOs Rob Carter (FedEx), Debra...

**HARVARD BUSINESS SCHOOL**

LYNDA M. APFLEGATE  
RICHARD T. WATSON  
PHIL WEINZIMER

**CAI**

N9-815-096  
JANUARY 29, 2015

As he practiced his golf swing at Lehigh Country Club on a sunny day in October, Tony Salvaggio's mind was still back in the office—making the ball's flight less accurate than normal. Salvaggio had cofounded Computer Aid, Inc. (CAI), in 1981, in Allentown, Pennsylvania. The company had grown steadily and, by the end of 2014, it was generating \$555 million in revenue per year. CAI provided information technology (IT) outsourcing services to Fortune 100 clients. It had a core set of intellectual property and a proven methodology for dramatically improving support for "legacy" software as a service (SaaS) IT systems, application development, help desks, and other IT processes that had been developed by CAI to enable it to provide high quality IT outsourcing services

# Topics

- Why Project Governance is Necessary
- State of Georgia Technology Strategy
- Georgia Governance Process History
- Georgia Enterprise Management System (GEMS)
- CIO.com article and Video

# How US State Governments Can Improve Customer Service

McKinsey&Company

“A McKinsey Center for Government survey finds that Americans are often dissatisfied with state services—and identifies significant opportunities for improvement.”

[http://www.mckinsey.com/insights/public\\_sector/how\\_us\\_state\\_governments\\_can\\_improve\\_customer\\_service?p=1](http://www.mckinsey.com/insights/public_sector/how_us_state_governments_can_improve_customer_service?p=1)

## Common Themes

- **Speed, Simplicity and Efficiency** Make Citizens Happy
- **Satisfaction is Often Lower** for More Essential Services
- Citizens are **Less Satisfied with Government Services** than with Private Sector Services
- Most **Citizens Prefer to Interact** with Government **Online**

# Recommendations

*Seize the Opportunity*

- Put Services for Citizens on the Leadership Agenda
- Set Priorities for Innovation
- Focus Transformation Programs on Service Elements that Matter Most to the Satisfaction of Citizens
- Measure Citizen Satisfaction Regularly

# How US States Improve Service to Citizens







## TRANSFORMING IT FOR BUSINESS SUCCESS

By Phil Weinzimer | Follow Advisor

OPINION

## Illinois's CIO is leading a statewide digital transformation

CIO | Jun 6, 2016 7:08 AM PT

<http://www.cio.com/article/3077989/cio-role/illinoiss-cio-is-leading-a-statewide-digital-transformation.html?nsdr=true>

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- Illinois is undergoing a digital transformation to improve the services it provides its citizens.
- At the core of the transformation is Hardik Bhatt, the state's CIO and secretary designate of innovation and technology.

<https://www.youtube.com/watch?v=RnR1VQVzGts&feature=youtu.be>



# Georgia 2025 Vision



Calvin Rhodes  
State of Georgia CIO

By 2025 Georgia agencies will leverage data to provide digital services for a broad range of citizens' needs and work closely with the private sector under a mature

- Citizen Access to Service
- Mobility
- Innovation
- Technology as a service

# GOVERNANCE FRAMEWORK- PROJECT EXCELLENCE

## Guiding Principles

### Visible Leadership

- Vision
- Executive Sponsor
- Business & IT Owner

### Defined Tactics

- Scope
- Plan
- Change Management

### Effective Communication

- Constant
- 360 Degrees Perspective
- Factual

## Project Excellence Governance Processes and Metrics

- Rigorous Processes and Oversight to Ensure Successful Governance of Projects
- Focused Metrics to Measure Project Governance and Project Execution

## Project Portfolio

### Sustain – Maintain the Business

- Help Desk
- Email
- Infrastructure
- Data Center
- Telephony
- Network

### Operational –Run the Business

- Sales /Marketing
- Customer Support
- Product Development
- Logistics
- Engineering
- Manufacturing

### Strategic –Innovate the Business

- New Products / New Markets
- Creative Customer Service
- Innovative Supply Chain

## Project Governance & Portfolio Management Solution

Managing Activities, Schedule, Cost, Resources, Risk

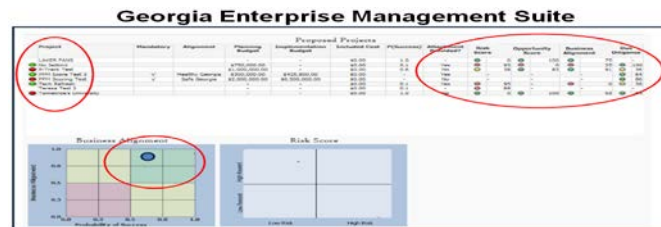
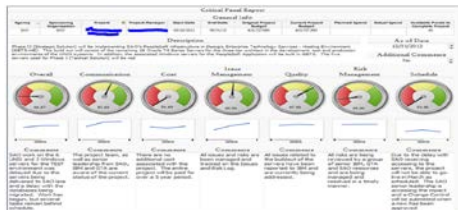


# Improve Value to Georgia Citizens

***As the stewards of taxpayer dollars, we need to ensure project success through a well-defined and proven governance process...Calvin Rhodes, CIO-State of Georgia***

- Identifies the **Key Predictors for Project Success**
- **Proactive** versus Reactive Solution
- **Promotes Teaming** through Active Communication /Training via Assessment Process

**Multi Million Dollars Savings to Reinvest in Innovative Projects**



# Governance Philosophy

- *Project Governance is a defined discipline, but you need a balanced view of how the project is progressing.*
- *Provide a level of discipline in managing projects to reduce project risk.*
- *Project managers need to be more proactive in anticipating risks.*
- *Project Stakeholders are an integral part of the project process.*
- *Make sure you collect the right data*
- *Data gathering time must be minimized*
- *Make sure data is analyzed properly*

*Teresa Reilly – PMO Director, Georgia Technology Authority*

<https://www.youtube.com/watch?v=MOVG86hCH5s&feature=youtu.be>



# Key Observations

- **Each Agency uses a different PPM System** to manage projects.
- **Three failed Enterprise-Wide PPM implementations** failed
- **PMO collects data from each agency** for key projects/collates, enters data into **Excel spreadsheets** and analyzes data for the monthly Enterprise Executive Management Meeting.
- **Spreadsheets are consolidated** into an overall document, which is used by PMO to Review Projects

# Key Challenges

- **Current systems are manually intensive/** Complex projects require oversight
- **Cumbersome effort in gathering project data** from each agency
- **Time consuming process** to prepare monthly dashboard reports
- **Qualitative data**, in the form of comments, provided by the project manager, **represent the Program Manager's view** of the project.
- **Current system is cumbersome** to use in capturing project issues
- **Key stakeholder input is NOT** represented in project status



# STATE OF GA NEW PROJECT GOVERNANCE PROCESS

## 129 STATE AGENCIES



- **400-600 projects/yr**

## Critical Project Review Panel



**Provides Oversight For Complex/Critical Projects**



### CRITERIA

- **Projects -> \$1M**
- **Or with significant business risk** that would impact the citizens of the state; regardless of project cost.
- **Projects -> \$10 Million**
  - Project Assessments*
  - through project lifecycle*
  - PMO attends Status Meetings*

### PARTICIPANTS

- The State CIO-Chair
- PMO Director
- State Agency Project Manager,
- Business Owner/ Vendor Project Manager
- Governor's Office Representative



- **GTA contracted with vendor** (CAI) to offer enterprise-wide portfolio management application
- **The application, Georgia Enterprise Management Suite (GEMS), provides insight** into the health and status of in-flight projects through the ability to combine traditional, quantitative operational data with qualitative assessment data from multiple stakeholders.
- The **benefits** include:
  - **Anytime, anywhere accessibility** since GEMS is a hosted, web-based application  
Capability for all contributors – such as project managers, team members and other key stakeholders – offer input regarding status and health of the project
  - **Easy** monthly reporting
  - **Better analytical tools** that look at the entire range of project indicators
  - **Improved visibility** into the performance of projects, programs and portfolios throughout their entire lifecycle

# Three Project Savings Examples

<u>PROJECT</u>	<u>SAVINGS</u>	<u>ISSUE</u>
Finance Project	\$ 300k	Vendor Issue
Case Management	\$ 700k	PM Issue
Health Management	\$ 400k	Poor Requirements



 IDG CONTRIBUTOR NETWORK [Want to Join?](#)

## TRANSFORMING IT FOR BUSINESS SUCCESS

By Phil Weinzimer,  Advisor, President, CIO | JUN 20, 2017 6:59 AM PT

### OPINION

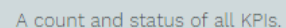
# How to Succeed at Project Governance

The State of Georgia saved millions of dollars in project costs by implementing processes and a tool that enables the Project Management Office (PMO) to manage projects proactively, identify key predictors for project success, and create an effective team environment among key stakeholders.



<https://www.cio.com/article/2693222/project-management/how-to-succeed-at-project-governance.html?nsdr=true>

## PARTICIPATION



## PARTICIPATION

Participation  
Rate

79%

## HUMAN FEEDBACK

## Critical Responses

7

## Free Responses

35

## Summary

## OPERATIONAL DATA

## Budget



CPI



SPI



## Schedule



## Issues Past Due

3

## Issues Critical

4

## Unresolved Risks

4

## Gate Adherence

75



MAIN NAVIGATION

Home

Human Feedback

Operational Data

Participation

My Projects

FILTERS

Projects

KPI

Date

Reset

Apply

# MY PROJECTS

This is the description of a page whose description is of the page with a description that is the page's description describing the page you're paging as described.

Name ▲	Description ▼
Marketing Portal Clubhouse	Develop a framework to easily create various unique portals to build a community that caters to different roles in the IT community. 1/15/2016: Presentation to To. ▲
Medium Waterfall Projec to be Recycled	TBD
MSC APO Project Implementation	CIT has been asked by Tony Salvaggio to monitor all AMI/APO projects being implemented in the MSC. . Need to get the Assignments setup . Pulse questionnaires .
NCC Digital Signage	We are resuming work on the project, having received funding and required enhancements from the Trane system. Project closed and delivered Monday 8/3. Closi
PO+ for Service Transition MVP	This project attempted to determine whether the Transition Mgmt Director would find PO+ useful. The MVP was to test whether the TM Director displays signs of
PPM Alpha for CIT	Configure PPM in prod test environment, exercise its functionality as part of CIT PPM activities, and document feedback for the PPM development team. Status as
PPM R2 - Manila Development	Develop a purpose built PPM stand alone application that interfaces with AMI/APO for project and resource data. Update: 3/19/2016: Development completed, Alp.
Pulse MVP	The Pulse Minimal Viable Product project was to leverage current APO technology to prove and document whether PMs wanted a free 1 month trial of the Pulse q.
Pulse of the Profession 2015 MVP	The PotP 2015 Minimal Viable Product was intended to prove that PMI's thought leadership themes are considered actionable by CAI prospects. Although nobody ..
Rise Vision Widget Development	This ongoing activity is a development effort to seed the Rise Vision platform with sellable widgets covering a variety of community requests. We hope to deploy ..
Ryder APO Implementation	This is an ongoing activity to implement APO at Ryder and deliver PO+ services on an ongoing basis throughout the life of the engagement. Deployment of APO wa
SAB Miller	Updates to SAB Miller cartridge containing EWS and Supermeasures questions. 11/7: Question rework has been submitted to SABMiller for their approval. once ap.
SIZ Phase	Development of an enhanced,web-based scheduling tool for Swim-in-Zone. Extending an existing Access database, we will move existing functionality to a web-b
Supermeasures Cartridge	The goal of this project is to provide a Supermeasures cartridge (SMART, SMPL, PAL, and PRPL) using the GQM approach. It will be backed with a minimalist cartri..
Test in Seconds	Development of a service to allow clients to test their web sites or web applications with a minimal effort. This is accomplished by CAI providing a service to auto.
Tracer - Scorecard	Tracer - Scorecard - This project exists for the purpose of distributing IT Scorecard EDQs on a monthly basis for the IT Scorecard dashboard.
Tracer Analysis	Dedicated team of resources has been assigned to perform a 60 day analysis and design of Tracer needs based on feedback from the TSC. Deliverables include a
Tracer PoC - API	This is a proof of concept project to determine the feasibility of linking external tracking systems to Tracer. This initial PoC is for a one way link, initiated outside o.
Tracer Reporting Phase 3	The Tracer Reporting project is for the replacement of Crystal Reports with Reporting Services. Total of 51 reports; 31 are 100% tested, 12 are in process and 12 are.
Tracer Task Unit CR	The Tracer Task Unit CR project enhances the named features to DotNet.
Tracer Usability - Phase 1	First phase of Tracer Transformation. Addresses CS, IN, Time, Dashboard and Search. Update 4/18: UAT Certification has been received from all but one site. Achie
Where Is My Project (APO Lite) Product Development	This is a 7 week project to develop a stand alone purpose Project monitoring application. There will be no "bells and whistles". Just a system to enter Project and .

Development of an enhanced, web-based scheduling tool for Swim-in-Zone. Extending an existing Access database, we will move existing functionality to a web-based application, while adding new capabilities. ....



79%

## Critical Responses

O

2

## Human Feedback Summary



## Budget

\$1,823  
\$0 +100%

CPI

0.9

## Schedule

$$\frac{5/15/16}{5/15/16}$$

SPI

# 1.1

## Issues Past Due

3

## Issues Critical

4

## Unresolved Risks

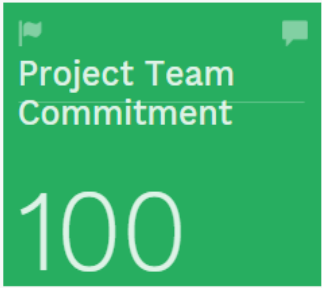
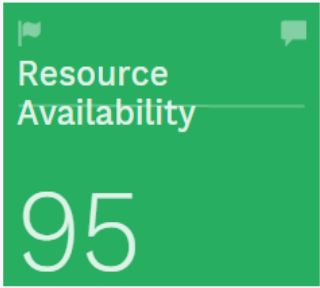
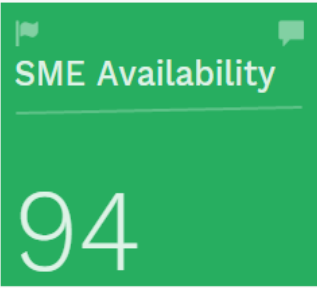
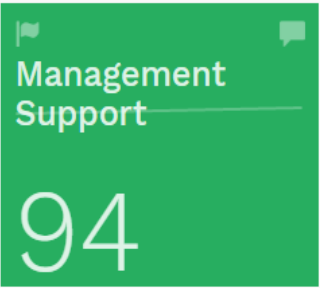
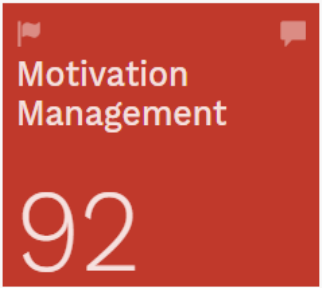
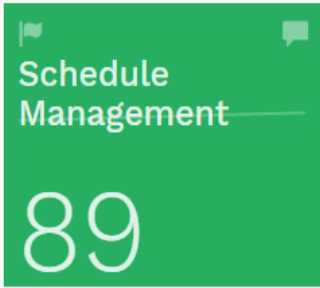
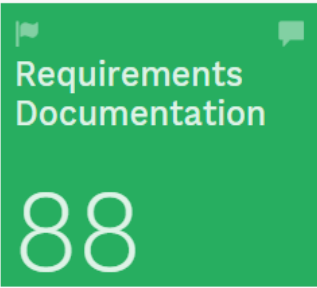
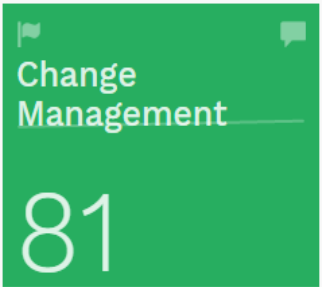
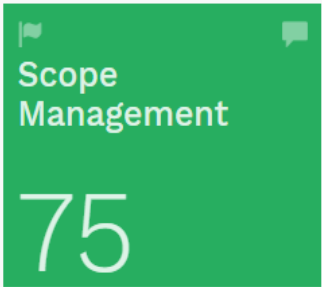
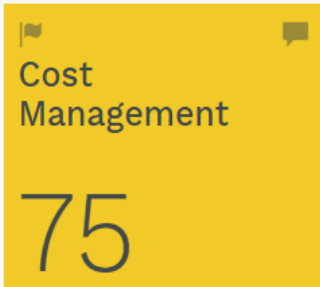
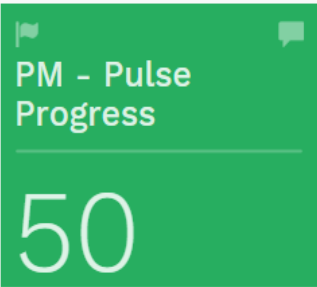
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## Gate Adherence

75



KPI GROUP 1



KPI Name	Score	Trend	Change
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KPI Group 1

KPI Name

Score

Sparkline

Change

PM - Pulse Progress

See Related Questions









Quick progress check on project


Heatmap
Box Plot
Free Response
Critical Response


	S.Agree	Agree	Neutral	Don't Know	Disagree	S.Disagree		
The project manager regularly tracks and repi	67	48	52	16	115	120	555/777	0
The project manager regularly tracks and repi	24	117	64	19	117	6	4/7	
The current approved project budget is greate	8	78	123	114	8	12	3/7	
Schedule deadline and project schedule are b	19	58	15	132	5	32	2/7	
Project delays are reflected in the overall proj	10	92	35	72	38	88	1/7	200



Quality Management

See Related Questions












Change Management

See Related Questions




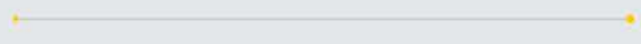







Cost Management

See Related Questions




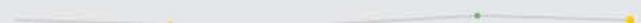






Scope Management

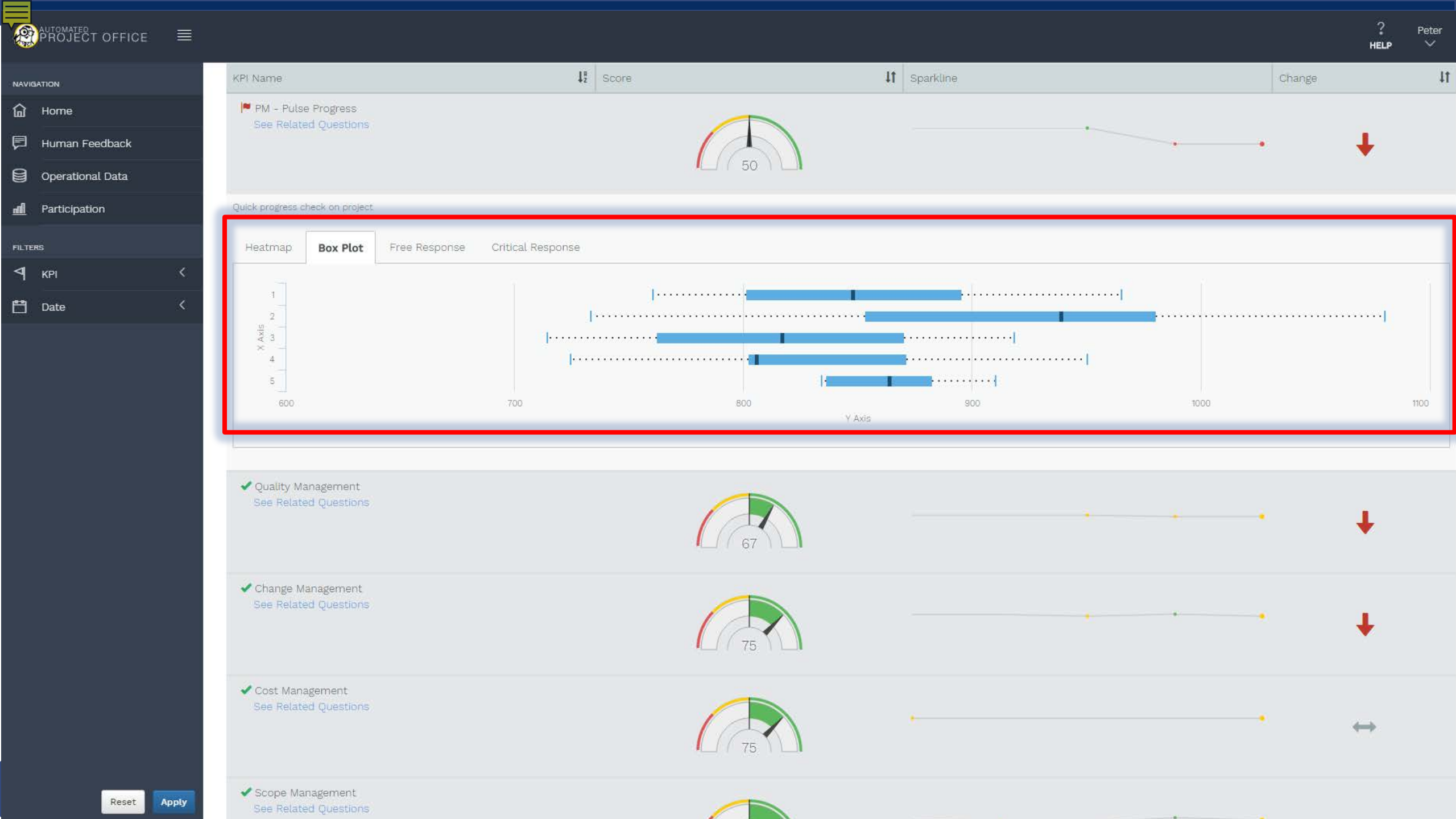
See Related Questions







Reset
Apply



Box Plot

Product Owner

Close

# MY PROJECTS' OPERATIONAL HARD DATA

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From Date: 2016-04-10

To Date: 2016-04-30

## COMMUNICATIONS

### EXECUTIVE SUMMARY

Date	Comments
(4/4/2016 1:06:50PM)	Ran end sprint 1 reports and distributed results.
(3/29/2016 2:03:09PM)	Based upon the project charter (no plan), the budget is for 2400h (\$132,000). So I have updated the original 200.
(3/29/2016 1:52:47PM)	PM indicated they are now in sprint 2, so the phase was changed to end sprint. It should be changed back to ex.
(2/25/2016 5:05:17PM)	The PM role was changed from Dale Malcolm to Andrew Haak.

### ALERTS:

Alert	Send Time
Notifications and Instructions - 01 Initiating Phase - Alert	03/29/2016 1:52 PM
Notifications and Instructions - 01 Initiating Phase - Alert	03/29/2016 1:52 PM
Notifications and Instructions - 01 Initiating Phase - Alert	03/29/2016 1:52 PM

MAIN NAVIGATION

Home

Human Feedback

Operational Data

Participation

My Projects

FILTERS

Projects

KPI

Date

Reset

Apply

MY PROJECTS' PARTICIPATION

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# Governance Process/Tool - Best Practices

- **Effective governance process** for the entire portfolio of projects
- **Web-based tool** that is easy to implement and use
- **Capture qualitative data** from key stakeholders (360 degree)
- **Dashboard metrics** of key project indicators
- **Capture key data for project requests** and analyze data based upon business need and potential risk.
- **Identify key risk indicators/provides predictive risk scores**
- **Easily import project data** into the governance solution
- **Effective Issue Management Capability**
- **Improves PM skills**(self-learning/360 degree feedback.





*The Georgia Technology Authority saves taxpayer money across 119 state agencies by implementing a process for project evaluation, review, governance, and tracking.*

# The Art of Project Governance

BY PHIL WEINZIMER

I am certain you have read about the 25-35% failure rate for IT projects. One could logically ask: how can this be when there are dozens of project management solutions in the marketplace, used by thousands of companies that focus on achieving project success? Yet, these statistics have become the standard and acceptable norm for project management organizations. As a CIO or PMO Director, are you ready to write off millions of dollars of inefficiencies and waste?

This is not the case for the Georgia Technology Authority (GTA), which manages information technology for the state of Georgia. Calvin Rhodes is the CIO, and Tom Fruman is the Director of En-

terprise Governance and Planning. "We are the stewards of taxpayer dollars and need to manage project risk," says Rhodes. Fruman's team provides governance for the 200-450 million dollars of critical projects executed each year by the 119 state agencies. Fruman believes "project success is based upon applying a discipline of process and insight to the management of project portfolios." It's all about reducing risk and uncovering "what's really going on behind the numbers that are typically reported by Project Managers." So, after a number of failed project portfolio solution implementations, he found the perfect governance solution – The CAI ITBuzz Enterprise

ACCELERATING IT SUCCESS | FEBRUARY 2013

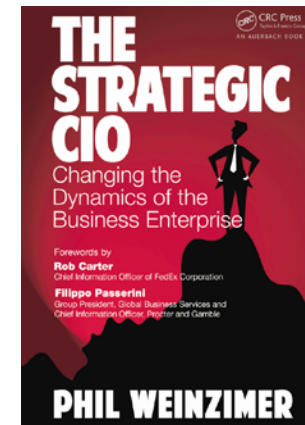
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END