all effective changes
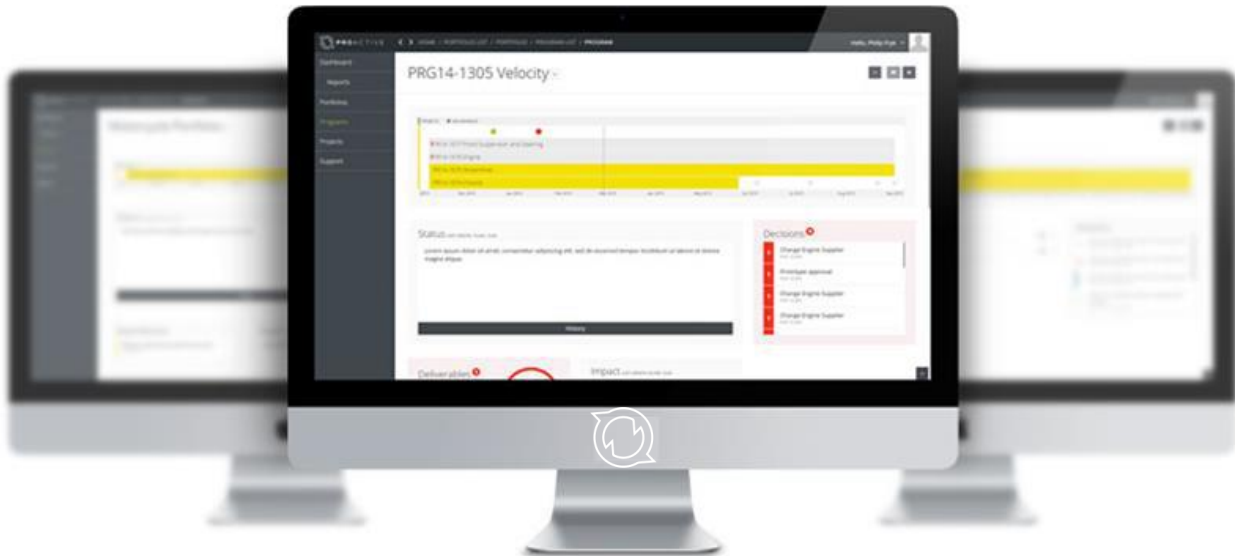

PROACTIVE®

The Boundary Lifting Solution

ProActive® the Boundary Lifting Application

Contents

Introduction

Cross Silo Leadership is very desirable because research has shown that companies with more cross-boundary collaboration will perform better. Currently the Leadership Teams have difficulties to manage cross-boundaries in order to stay in-control.

One of the causes is that there is no up-to-date transparent and unfiltered information available for management regarding strategic Programs and Projects to manage them sufficiently across Silos. They only have <10% of the relevant information available needed to be in control of their strategic Programs and Projects. This is a real issue since it will be very difficult to steer and control the strategic Programs and Projects based on the level of detail and the filtered information available. Often management is trying to get a grip on these Programs and Projects by conducting deep dives, however they are time consuming and the deep dive provides at best half the truth and will not provide a good insight in the real status. What is needed is a full reliable transparent 24x7 Cross Silo environment which shows the actual status on the elements needed to control them. Such an environment can be created with a Boundary Lifting application.

The idea of a Boundary Lifting application has developed over a period of several years with architectural principles behind it. It is positioned in a place which is not covered by other applications and thus it needs explanation and a different mindset. Once the mindset is changed and using a Boundary Lifting application to manage across Silos, is a fact, the benefits for any company are enormous and will show immediately. Our Boundary Lifting management application ProActive® has several unique key differentiators which have been derived from a study that was conducted.

What is the definition of ProActive®?

ProActive® is a Boundary Lifting Management Application that can be defined as follows:

'ProActive® is a Transparent Management Application lifting existing boundaries with 24x7 dashboards and automated triggers, connecting all Portfolios, Programs and Projects Cross Silos into one single source of truth'

Strategy

In the current landscape C-Level and Higher Management don't have enough insights and controls regarding their Strategic Programs, many details are available but no overview and issues are coming up afterwards instead of straight away.

C-Level and Higher Management only need a few elements to get back in control of their complete environment. These elements are: a direct insight in the status and progress of important Phases, Deliverables, Dependencies and Decisions that need to be taken. This enables them to proactively see what the status is and which actions they could take in case it is showing that deadlines might be missed or issues are popping up.
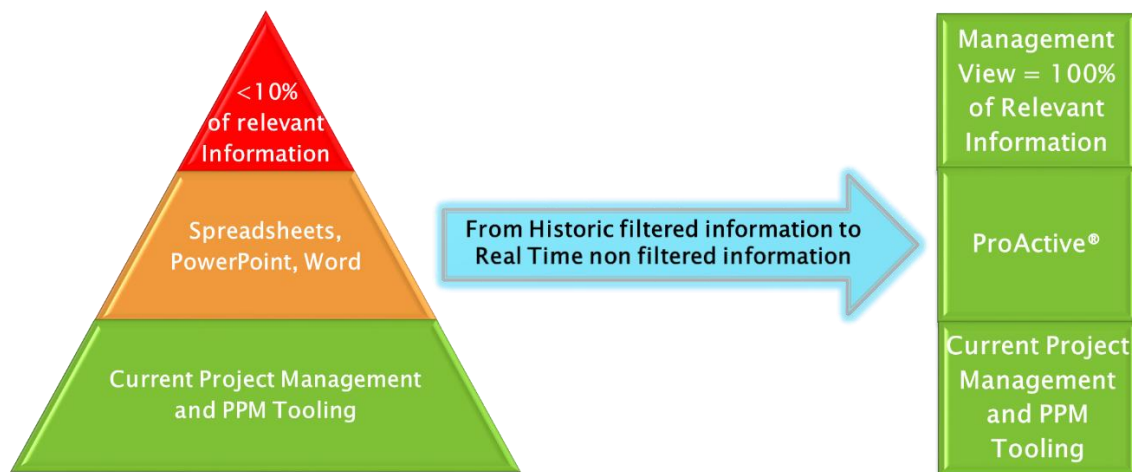
We envisioned that a Boundary Lifting application needed to follow certain architectural principles in order to be an exact fit covering the requirements for such an application. These principles are:

- o No connections to other existing systems.
- o No or little training needed to work with the application.
- o No or little overlap with other applications.
- o No conversion from other applications or tools
- o Minimizing the administration effort of your employees.

By following these principals we made implementing it in any organization very fast and easy, and we minimized the administrative burden.
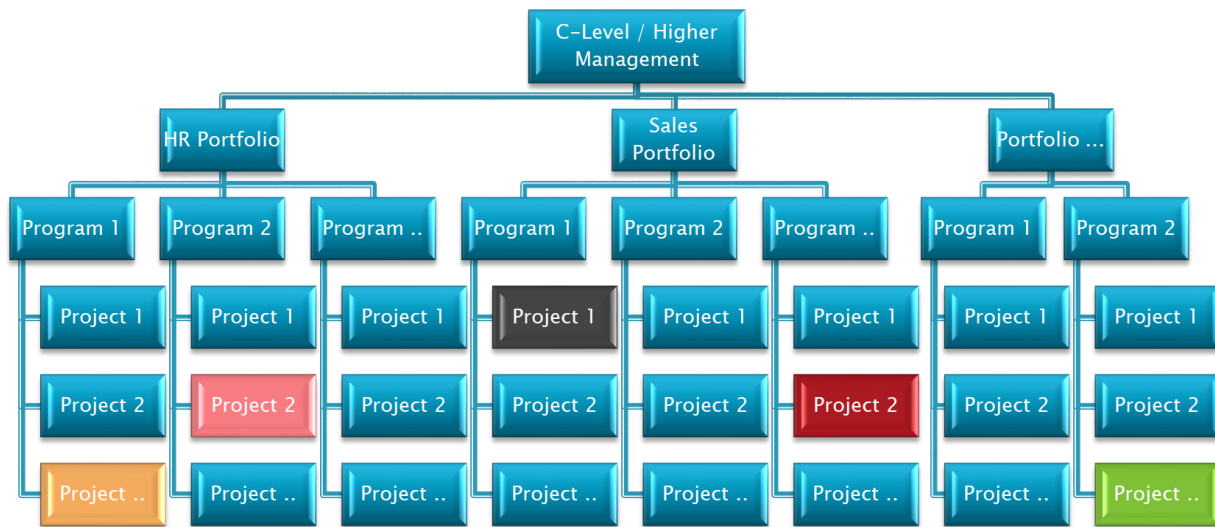
Positioning

The Boundary Lifting application ProActive® is positioned as a management solution to manage the complete Cross Silo Portfolio, Program and Project environment. As the figure below shows, ProActive® will replace the manual reporting with Spreadsheets, PowerPoints and Word and will provide a full transparent view of relevant information with automatic triggers. We will take a look at the position of the current available tools which have hardly any overlap with a Boundary Lifting application and they are still needed even when ProActive® is in place.

Managing Standard Projects

Often for the planning and Management of standard Projects, MS Excel, MS PowerPoint, MS Project, OpenWorkbench, Teams, Smartsheet, Jira, and so on are used. For safeguarding the progress of Projects a weekly report is created in PowerPoint, Excel or Word which will be discussed during a Project board or meeting where it is also decided how to solve issues and to mitigate risks. The actions with action holders are mostly defined in a spreadsheet to keep track of progress. Common for these tools are that they are only suitable for managing projects individually and they are Task Management tools.

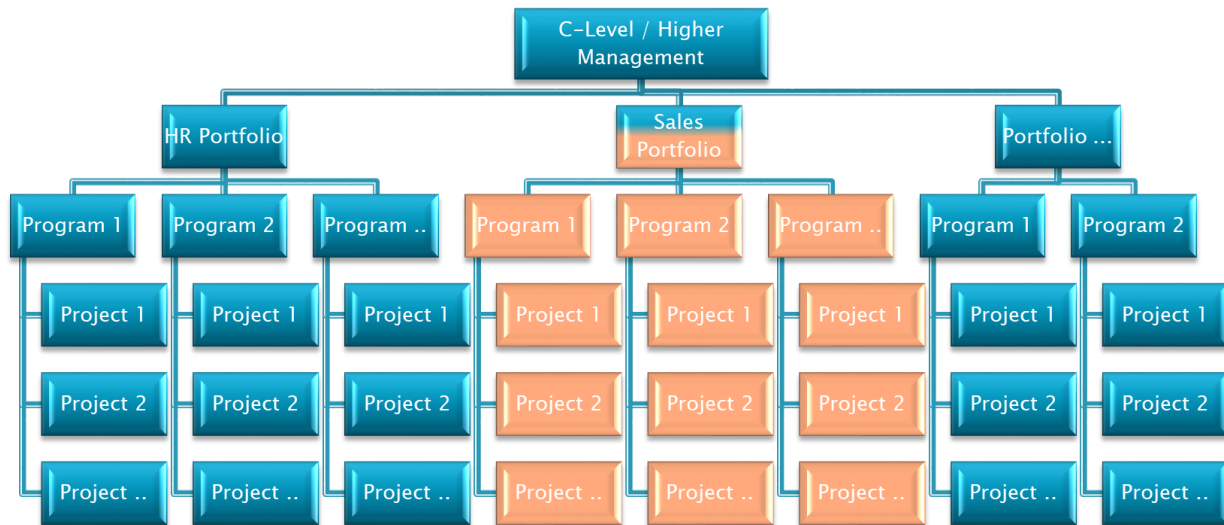### Standard Projects are mostly independently managed

Managing Complex and Large Strategic Programs

For Complex and Large Strategic Programs with several dependencies mostly PPM (Project-Portfolio Management) tools are used like HP PPM, MS Project Server, Clarizen, Changepoint, Celoxis, Sciforma.

These tools give a high level overview of all the Programs and their progress within a Business Portfolio or Silo, were you can zoom-in into the details of each Program or Project. These tools have in general the possibility to do Resource Management, Financial Administration, Risk Management and Reporting and Analytics. They have several integrations with other applications like Jira, SalesForce, MS SharePoint, and Google Sheets. These solutions are also Task Management Tools. Reports for the Portfolio Manager are mostly made in PowerPoint, Excel or Word and discussed every fortnight. The Portfolio Manager creates mostly monthly a report in PowerPoint, Excel or Word, extracted from his report to be delivered to C-Level or Higher Management.

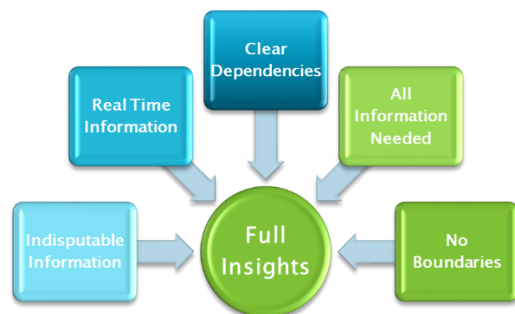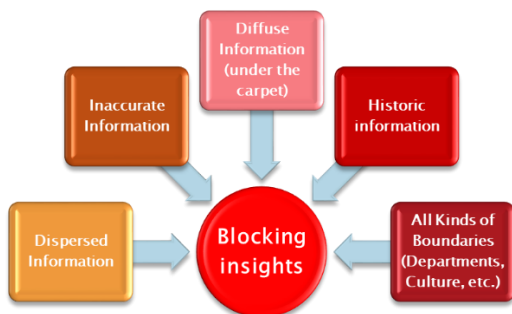# Complex/Large Strategic Programs are mostly managed per Portfolio

Lifting the Boundaries

Both categories have one thing in common, they are not management tools but tools for the Program Manager and Project Manager to manage the tasks needed to conclude Programs and Project successful. A Boundary Lifting application is complementary and does not replace these tools. Thus they should not be made obsolete. Looking at the current reporting process, it means that C-Level Management and Higher Management are managing in a way that they have to base their decisions on dispersed information, inaccurate information, diffused information, filtered information and historic information. This mostly results in an uncomfortable feeling especially when things are not going the right way, which than leads to the Management asking for more and more details which still doesn't give them the insight needed. A Boundary Lifting application will solve this uncomfortable feeling and will result in decisions based on a full reliable insight on undispersed information.
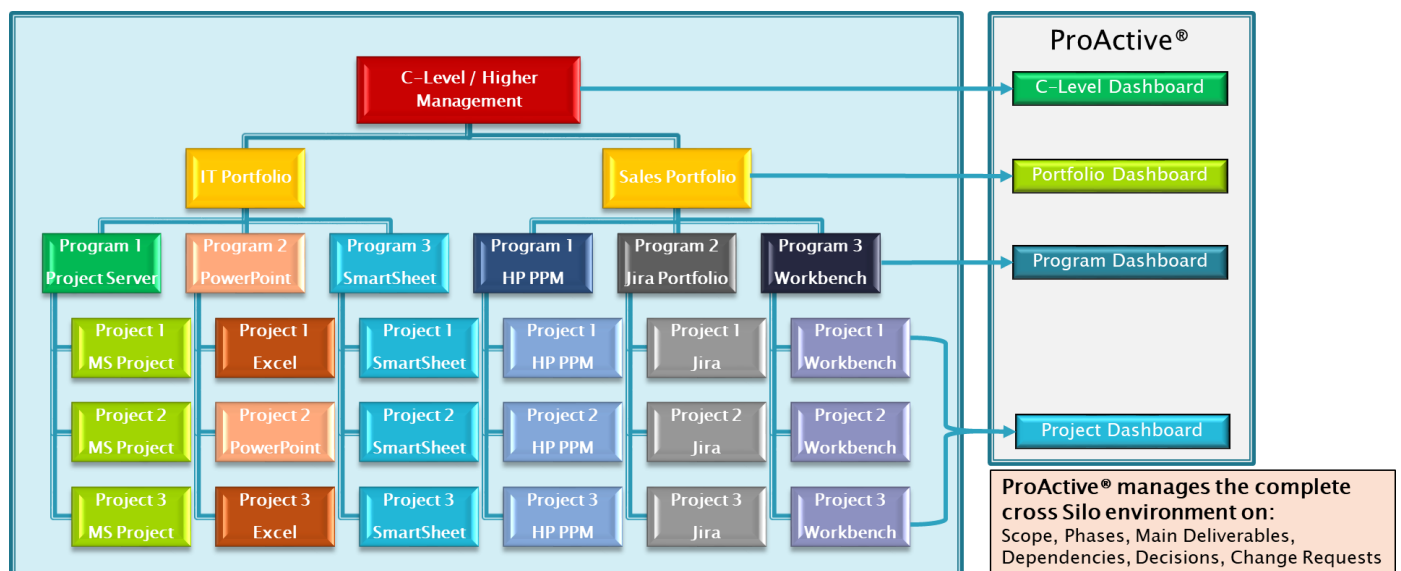
Managing the complete Cross Silo environment

What is missing is that C-Level and Higher Management don't have enough insights and controls regarding their Strategic Programs, a lot of details are available but the overview is missing especially across Silos. Issues are coming up afterwards instead of straight away and they only have PowerPoint, Excel, Word and complex and detailed task management tools. In short they currently don't have a management application to their disposal that can provide this. A Boundary Lifting application is the management tool that does provide this.

C-Level and Higher Management only need a few items to get back in control of their complete environment. These items are direct insight in the status and progress of important:

- Phases,
- Deliverables,
- Dependencies
- Decisions that need to be taken

This combination with 24x7 dashboards on all levels, enables them to understand what the status is and which actions they can take in case issues are coming up or deadlines that might be missed. They go from managing history to proactively managing their cross Silo environment only on the important relevant information.

Key Features of ProActive®

Below the Unique Key Features of ProActive®.

Key Features

| 24x7 Dashboards on all Management levels | Dependency Management | Automated Triggers & Change Requests | Auditable at any time with Reliable History | Retirement of Program / Projects | Management External Parties | Performance Management | Real Time non Filtered Relevant Information | Unalterable & Undeletable File Storage Containers | Easy to Implement & Master |

24x7 Dashboards on all Management Levels

- ProActive® has 24x7 dashboards on all management levels to enable a full overarching overview at any time and place. This makes Remote Management across Silos really easy and it provides the comfortable feeling of being in control.

Dependency Management

- The fully integrated Dependency Management is one of the Core pillars of our solution. It provides a simple way to connect Dependencies to Deliverables. Once they are connected or defined, they will be clear and visible for management especially when decisions regarding deadlines need to be made.

Automated Triggers & Change Requests

- To make sure deadlines are not being missed without noticing, automated triggers are built in on Phases, Deliverables, Dependencies, Decisions and Change Requests. Furthermore when deadlines, timelines or scope needs to be changed, automatic Change Requests are triggered. There is also a feature that will show up if one reports green but there are underlying issues.

Auditable at any Time with Reliable History

- ProActive® provides a full history of everything what happened on any item at any time on a timeline. History can't be changed afterwards so that the integrity of the history is guaranteed. This includes all entered information and all attached planning files and therefore it can be audited at any time and place.

Retirement of Program/Project

- Programs and Projects can be retired which will prevent any changes from then on but it will keep all History needed for compliancy.

Management External Parties

- ProActive® will make it easy to manage External Parties on their progress by providing a full Transparent Environment which will show their main Phases, Deliverables and Dependencies.

Performance Management

- Program/Project Managers and External Parties can be measured on their performance. This enables Management to support and guide them to improve their performance needed for better results.

Real Time non Filtered Relevant Information

- Management has according to several studies a less than 10% view on Relevant Information. ProActive® provides a Real Time non Filtered view on 100% of all Relevant Information.

Unalterable & Undeletable File Storage Containers

- Our Boundary Lifting Solution contains File Storage Containers where the files, once they are in these Containers, can't be changed or deleted. Since the time stamp makes a difference, there is no need for version control.

Easy to Implement & Master

- Since there are no connections to other applications, it will be easy to implement ProActive® in any kind of environment. The user friendly interface and the ease of use makes it that the application is very intuitive and does not need a lot of training and instructions. However it does need a different Mindset to use ProActive® which will be mastered during implementation.
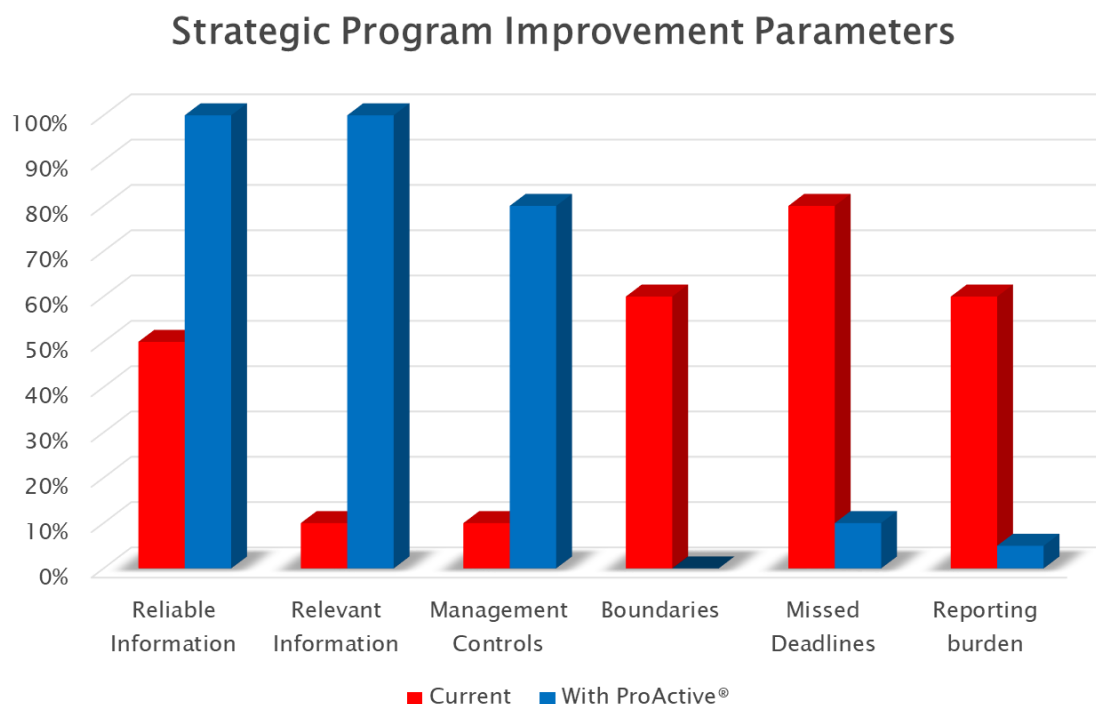
Mindset

A successful implementation of a Boundary Lifting application needs a different mindset of the people using it. They need to understand what is needed and not what they currently have or what they need in order to manage their Program or Project. This mindset needs to change on all levels.

- o Mindset of Management should be 'No Details only Overview'
  They need to change their way of thinking in order to understand that they don't need the details (no micromanagement) and that they should not be interested in how a Program or Project is Managed on their tasks but that they should be interested if the Programs and Projects are going to make the deadlines and if the phases, deliverables and the required decisions are made on time.
- o Mindset of the Program Manager and Project Manager should be 'Transparent Management steering Information'
  They need to change their way of thinking in order to understand which phases and deliverables are important to the Management and what will give them the possibility to steer the Programs and Projects. These phases and deliverables might not be the same as defined in their current Program/Project Management tools.
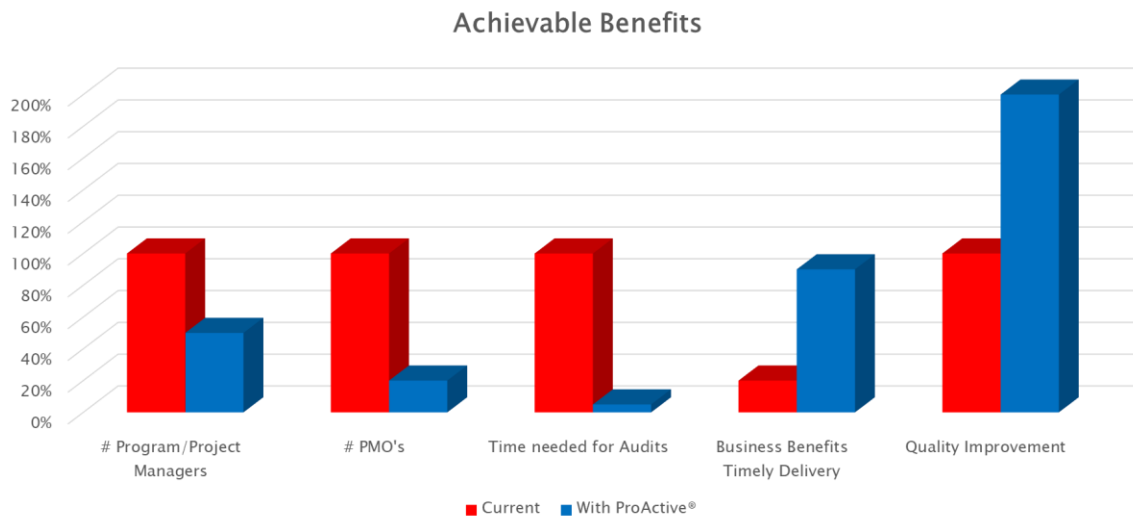
Improvement parameters

There are several parameters that could improve the overall performance of the (Strategic) Programs and Projects. The most important ones are displayed in the graph below, which is showing the current percentage and the improvements that can be made with ProActive®.

Strategic Program Improvement Parameters
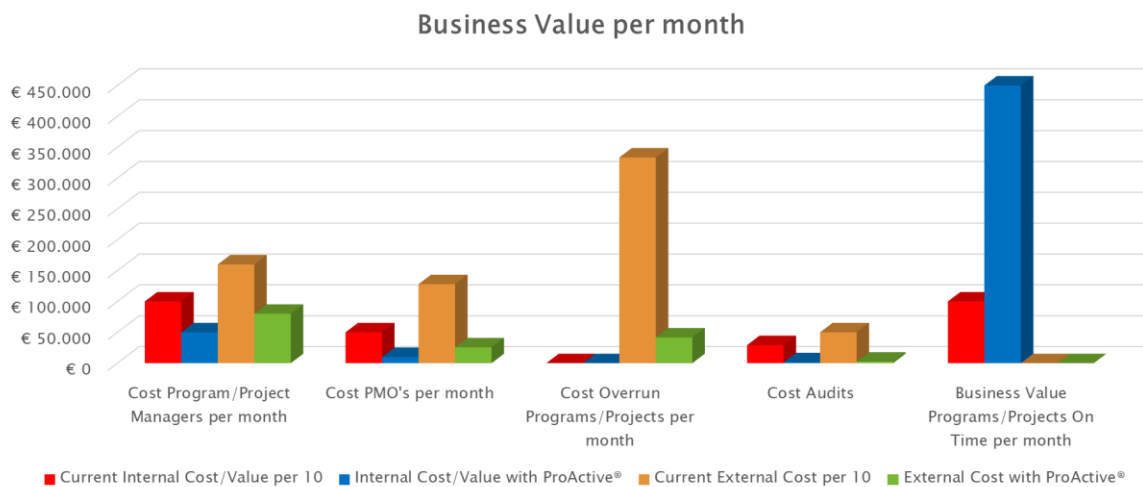
Legend: ■ Current ■ With ProActive®

Achievable Benefits

The benefits that could be achieved by implementing ProActive® are significant and are based on our experience and customer data. However to achieve these benefits you do need to change the mindset of the people working with ProActive® otherwise the effect will be less impressive. We are able to calculate your achievable benefits with our Business Case Calculator. The graph below is showing the achievable benefits.

Achievable Benefits

Value of ProActive®

The value that could be achieved with ProActive® is calculated into real figures based on the benefits, our experience and customer data. We believe that this is a real achievable value, which can contribute tremendously to the company's profitability. The graph below is showing the possible business value that can be achieved per month.

Business Value per month

Conclusion

By implementing ProActive®, our Boundary Lifting Management Application you will get back in control of your complete cross Silo environment, save time and money and enjoy the benefits it provides. Even in currently running Programs and Projects it will show all that needs to be improved and what needs to be done to get them back on track or to keep them on track. Have the comfortable feeling that you are in control even when you have to manage the cross Silo environment remotely.

Frequently asked questions

1. *Which Boundary Lifting applications are available?*
   Answer:
   At this moment in time there is only one Boundary Lifting application available. It is ProActive® of All Effective Changes B.V.. For more information: https://effectivechanges.com/tools and https://proactive.global

2. *Are my current Project Management tools and PPM tools obsolete?*
   Answer:
   No. You still need these tools to manage the tasks of the Programs and Projects.

3. *It looks like I am duplicating and I need to fill everything in, in both tools and thus getting a lot more work to do?*
   Answer:
   No it looks like it, but actually you are not duplicating since there is a difference between what is needed in both tools. Furthermore you are saving time since you do not need to prepare reports and need to attend less overall meetings. Also the escalation process is a lot easier.

4. *Do I need a lot of training?*
   Answer:

   No. ProActive® is easy to use. However it does need a different mindset but this will not take a long time and is mostly done on the job.

5. *This is a Management tool so that they can look into what is going on. Does this keep me off my work?*
   Answer:
   No this will not keep you of your work. It will give you more time to manage your Program or Project since the Management is not interested anymore in the details and does not want to know how and what you manage to make your deadlines.