# Marketing Department at Fleet One Finds Perfect Work Management Solution - Case Study (April 2013)

This case study was selected by the Workflow Management Coalition as the 2013 Award winner for Excellence in Case Management - Knowledge Worker Innovation.

## 1. Executive Summary / Abstract

Fleet One is a midsized company that provides fuel cards and other financial services to private and governmental organizations with fleets of vehicles. The 9-person marketing department was struggling with managing their workload. They receive numerous requests from company management and colleagues in other departments for preparing marketing collateral, advertisements, exhibits at trade shows, marketing programs, etc. On an ongoing basis the department is typically working on 40 or 50 requests at a time. Each request can be characterized as a "case" that requires coordinated and collaborative work from several knowledge workers in the department on a strict delivery deadline. For example, a relatively simple piece of promotional collateral requires interactive input and participation from copy-writer, layout, production, and distribution staff who must also collaborate with subject matter experts, product managers, corporate attorneys, accountants, and management reviewers. Each individual's obligations to complete the project must be tracked on a strict deadline. Each knowledge worker in the department is working on multiple requests at a time on various schedules; and so oversight of the whole workload, both by person and across the department, is critical to managing personal and departmental resources. Flexibility is key; individual obligations are initially mapped out in the context of the final delivery, but it rarely turns out exactly according to plan. A high degree of communication and collaboration among the team is needed to juggle changing schedules across multiple projects. In October 2012, Fleet One installed an innovative knowledge worker system that enabled the department to improve their coordination, efficiency, visibility, and governance over the activities in the department. Over the first 4 months the group handled over 250 requests with the new system. The system is producing a new class of granular performance data that is providing new insights into individual and group performance.

## 2. Overview

Due to the nature of the marketing department's activities and the high degree of interactivity between knowledge workers, **the fundamental challenge was to improve collaboration.** The head of the department, the Vice President of Marketing, can be considered the "case manager". In order to deliver each case on time she must ensure the successful coordination of work across several people in her department. The nature of these tasks requires a high degree of engagement and interactivity between knowledge workers which depends on an up-to-the-minute, shared understanding of "where do we stand" and "who's got the ball for the next action". This high degree of interactivity requires a balance between structure and flexibility.

Each work request the VP makes spawns a work-delivery "conversation" between her and the performer. The conversation follows a specific workflow sequence of four stages: Negotiation, Delivery, Acknowledgement, and Closed.

**Negotiation Stage.** The VP makes a specific request of an individual in her department (e.g. Can you get the ad developed by next Friday?). The request is entered in the new system using a simple form that also captures contextual information like customer, project name, and proposed budget hours. Any associated documents can be attached to the request. Because various performers will be involved in completing the work, she shares/broadcasts the request to other "Observers" who can then follow the conversation and add comments for the record.

The copy-writer/performer receives an email trigger that the request has been made, and a link in the email directs them to the system for entering a response. Once the performer has logged in to the system, the request shows up in the performer's "Due From Me" list. Upon opening the request, the performer is presented with four specific response options: Agree, Decline, Counter-Offer, or Comment (e.g. ask for more information). The performer selects one of the four responses to the request (e.g. Counter-Offer: I can't get it done by Friday, but I could by the following Tuesday. Will that be ok?). The two parties (requester and performer) conduct an explicit conversation, and the negotiation stage concludes with the performer making a clear agreement to deliver on an agreed date. This is a key differentiator from task and project management systems that "assign" work tasks without response or explicit commitment from the performer.

**Delivery Stage**. In this stage the performer is engaged in following through on their delivery agreement. The system supports and encourages ongoing dialog between all the parties (requester, performer, and observers) by enabling specific follow-on actions. For example, the requester can ask for progress reports, add comments, or, if necessary cancel the agreement. Performers, on the other hand, may report progress or request to amend the agreement as new issues or problems emerge along the way. Performers are also obliged to keep the requester up to date on the status of their agreement by indicating one of three states: "commitment is on track" (green); "commitment is in jeopardy" (yellow); or "commitment can no longer be met" (red). In this way the requester, and other observers, can be alerted in real time as to when breakdowns are occurring and not spend time on needless follow up. This stage concludes when the performer takes the action to "Deliver".

**Acknowledgement Stage.** The system sends an email to the requester signaling that a delivery has been made. The task is not complete until the requester/case manager is satisfied with the final product. Otherwise they have the action to "Request rework" which sends the task back to the performer. When the requester takes the action to "accept" the final delivery, the conversation moves to the "Closed" stage.

**Closed Stage.** Completed conversations are archived in a list view that enables sorting and retrieval according to a variety of criteria including requester, performer, due date, project, and customer. Each record includes a complete thread of the whole dialog from request through acceptance. This documentation enables granular review of who said what to whom and all the associated details and documents associated with the initial request. The commitment data enables new levels of governance and performance management insights. Archives can also be helpful in tracking compliance issues.

Beyond just tracking the dialog between participants, the whole work-delivery conversation is also shared/broadcast to other concerned parties. The system enables the case manager/VP to designate her supervisor as an "observer" for all the cases in her domain, thus enabling, for the first time, the entire workload of her department to be presented to her superior. This has replaced writing progress and status reports and has enabled a more granular discussion of issues and performance metrics with her superior. The VP can also designate observers in other departments outside of her own who have interest in the progress of the case.

The underlying technology enables all users of the system to be equally responsive through their mobile devices. All screens and features are available across the internet.

All communications surrounding each case are unified. All inputs and updates made in the system are sent immediately to each participant's email as well as their private group social media channel. Each action taken by every participant in the case is date-stamped and recorded in the case history along with associated commentary and supporting documents. The complete dialog thread is presented in the context of the case and archived for later review and analysis.

**The second challenge was enabling flexibility while at the same time maintaining rigor and accountability.** Since flexibility requires order, the system assures rigor in two ways. First is the requirement that each request must go through all four stages (negotiation – delivery – acknowledgement - closed). Second is the requirement that each request can have any number of observers, but only one performer who is accountable for delivery of the agreed outcome. Complex cases involving several people are handled through the use of any number of "supporting" requests. An essential requirement of the system was the ability to link together supporting requests. Successful completion of a “parent” request may depend on the performance of one or more “supporting” requests, but each has a specific individual performer. Request-to-supporting-request dependencies can be added at any time by the performer. This enables the tracking and oversight of the whole network of interdependent requests by case, by due date, by performer, by account, etc.

Beyond these two requirements (i.e., four-stage workflow and one accountable performer), the system must be extraordinarily flexible in terms of size, scope, and number of participants. Some requests last a couple days, while others last 3 months or more. Some involve one performer while others involve up to five supporting performers. While the same expertise is needed by each performer (e.g. copy-writer), each request is unique. Delivery dates are often extended, sometimes up to 4 or 5 times over the course of a case that took two months to close.

**The third challenge was providing access to case histories and archiving.** All participants in a case (VP, performers, and all observers) have anytime/anywhere access to the full case record including supporting documents. Access to records is limited to those participants based on satisfying login credentials and strict authentication/permission requirements. Closing a case can only be accomplished by the requester after they have received and accepted the performer’s final delivery. Closed cases are archived and remain viewable by all participants in the case. Sort and retrieval capabilities are available across several criteria to enable contextual follow up, analysis, and compliance monitoring.

## 3. BUSINESS CONTEXT

Before the new system was implemented the marketing department used Outlook Tasks to track their work. Tasks were identified and assigned with due dates to various people in the department. The group had been using Outlook for several years. The Marketing VP, however, was unsatisfied with this solution and had been looking for over two years for an alternative system that would better support collaboration among her team.

## 4. THE KEY INNOVATIONS

### *4.1 Case Handling Business*

The new system provided numerous innovations, but perhaps the most important was the ability to easily link requests to other requests. Supporting requests could be added onto "parent" requests at any time. Major requests are linked to a hierarchy of supporting requests. The manager can now see the entire project and all its dependencies in a single context. The manager can drill down the chain to view the details of any supporting request.

A second innovation was the ability to attach files and documents that reside within the context of the work request.

Any number of "observers" can be added to a request tracking conversation. This provides all interested parties with up-to-the-minute status on issues as they emerge. For the first time, the Marketing VP was able to provide a comprehensive view to her superior of all the activity going on in her department.

A series of dashboards enable users to quickly review and sort all requests "due from me" and "due from others". Another dashboard shows all active requests where the user is requester, performer, observer, or parent requester. This view enables a comprehensive and interactive view of all the tasks each user is involved in.

Once deliveries are made and accepted, the complete work conversation, including attachments, is saved in an easily accessible and sortable archive. Historical information and performance metrics can be mined from this data.

### *4.2 Business*

The new system has changed the way the Marketing VP and her department engages with their customers and stakeholders. First of all, the VP began the practice of making her superior executive an observer on all the work tasks underway in her department. For the first time, she was able to enable her superior to view and participate directly in all the activities in her group. This led to richer conversations about the performance of the group.

The marketing group customers include colleagues in other departments across the company who request collateral, promotion, campaigns, etc. that the marketing department develops and delivers. In order to consolidate requests from these customers with the activities and responsibilities of the staff within her department, the Marketing VP began the practice of requiring that all requests of her department be composed, submitted, and negotiated with the same new system. Managers in other departments now make requests and negotiate clear delivery agreements with the Marketing VP who then, in turn, makes a series of linked, supporting requests to her staff in the same system. These customers can then monitor progress and participate directly in the work conversations.

### *4.3 Organization & Social*

Collaboration among team members has improved. The system enforces a “managed conversation” that has added precision to the work dialog. The “one-way” task assignment process that was used formerly has been replaced with a “two-way” negotiation that results in a clear agreement to deliver on a certain date. The performer is now more involved in establishing achievable outcomes. Commitments are clarified as to who is accountable for what and who has the ball for the next action. Each person in the group has a personal work list that shows tasks “due from me” and “due from others”.

Each performer is also expected to maintain an up-to-date indication of the status of meeting their individual commitments using simple color-coded icons. Green indicates they are on track to meet the agreed target date. Yellow means their commitment is in jeopardy. Red indicates that there has been a breakdown that will prevent the performer from meeting their agreed due date. This simple reporting both cuts down on needless check ups by the requester, and enables early identification of problem areas. Oftentimes these breakdowns are identified much earlier than in the past. When a performer changes the status, amendments to the original agreement or new agreements are made explicitly. The integration of task and relationship management requires more direct communication and has tended to build trust.

The new work management system is integrated with both the email and social media tools (Chatter in this case) everyone uses each day. Every entry, change, and update in the system is immediately sent to all participants in that work conversation (i.e. requesters, performers, observers, and parent requesters). Links in the emails bring the user directly to the relevant work request where the entire conversation thread is captured and presented in the context of the work request.

The new system has become the “center” of all marketing tasks. Everyone in the department uses it to submit and execute work commitments. It is now a standard part of the work cycle on each project.

## 5. HURDLES OVERCOME

### *Organization Adoption*

The cost to acquire and install the new system was minimal so there was no significant hurdle to get management approval.

Adoption was virtually immediate. Except for a department meeting to discuss the change in business practices, the system required no training regarding the user interface or functionality. The new tool was “plugged into” their current work environment. Within two weeks, the entire marketing department was “100% committed” to using the new system. The benefits gained by the system were apparent to both the department head and the individual staff members.

## 6. BENEFITS

### *6.1 Cost Savings / Time Reductions*

The system has improved efficiency and reduced the amount of time the department spends on collaboration and execution. Handoffs are clearer. Visibility and reporting on work progress is much improved. The group has a better view of commitments and the various people involved in each commitment. Performance management and governance has improved. The group reports improvements in hitting their deadlines. With less time spent on coordination, the group reports more time is being spent on getting marketing results for the company.

### *6.2 Increased Revenues*

Though the effect to increase revenues is indirect, the improvements in the quality of reporting and viewing the marketing funnel certainly save time and lead to more time spent bringing in leads and branding the company.

### *6.3 Quality Improvements*

All users of the system (the Marketing VP, staff performers, her senior executive, and colleagues in other departments) have become more effective and efficient. Work agreements are explicit. Individual accountability is clear and visible to all. Dashboards enable better tracking of activities by performer, customer, account, etc. Coordination has improved which has resulted in time-savings. Over the initial four-month startup period, the marketing group has successfully handled over 250 differentiated, non-repeatable work tasks according to a standard process (request – agree - deliver – assess). Archives of completed tasks promote organization learning. Senior management has improved visibility into the department workload and performance issues. Work relationships are improving.

## 7. BEST PRACTICES, LEARNING POINTS AND PITFALLS

### *7.1 Best Practices and Learning Points*

- ✓ *New work norms should be discussed ahead of time. While the system appears to be just a simple work-tracking tool, its underlying behaviors and practices reflect significant changes in work norms.*
- ✓ *The idea of allowing staff people to "negotiate" work assignments may be a radical notion in some organizations. Getting the group comfortable with the new approach takes some getting used to.*
- ✓ *Yielding a level of "authority" over to staff people who are empowered to respond to work requests is the quid pro quo to achieving greater accountability and commitment to shared outcomes.*
- ✓ *The new system may work best in high-trust organizations where sharing details about individual work performance is a reasonably comfortable practice.*

### *7.2 Pitfalls*

- ✗ *The new practices and communication patterns encouraged by the system may be seen as incompatible with a command-and-control management style where assignments are more-or-less passed down as "orders".*
- ✗ *The success of the system will largely depend on the maturity and trust among members of the group. A certain level of trust is needed before individuals will feel comfortable exposing details of their individual work activities to others.*
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## 8. COMPETITIVE ADVANTAGES

As mentioned above regarding increasing revenues, improvements to the company's competitive advantage are indirect but some advantage can be inferred.

## 9. TECHNOLOGY

The new work management system was implemented on top of the Force.com technology platform. All system users were already licensed to use the Saleforce.com CRM tool. The work tracking system described in this case study was identified, selected, and installed directly from the Salesforce App Exchange by Fleet One's system administrator without any assistance or support from the system vendor. The work-tracking system was downloaded, installed, and distributed to users in less than 15 minutes. The new application integrated seamlessly into the pre-existing menu structure and matched the user interface style of the existing Salesforce application, and so there was no training required. Users were up and running within 30 minutes of the installation.

## 10. THE TECHNOLOGY AND SERVICE PROVIDERS

The CommitKeeper (www.commitkeeper.com) work management/business execution system was provided by 4Spires (www.4spires.com). The product was installed directly from the Salesforce AppExchange without support from the vendor and automatically incorporated into each user's Salesforce application. The cost is $9 per user per month ($972 per year for the whole 9-person department in this case). 4Spires also offers a generic cloud version of the CommitKeeper system that requires only internet access (i.e. no underlying technology platform license). Other versions under development include a mobile version on the Android platform and an API for enabling quick incorporation of the conversation-tracking system into other complementary systems.