
An ERP Story:¹ Choosing a Project Leader (B)^{2, 3}

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Choosing a Project Leader

A few days later, François Caron, the account manager in charge of the relationship with the client, and Luc Martin, in charge of supervising the delivery of the mandate to the client, meet again with Mr. Roberge to propose, as planned, the candidacy of three project leaders capable of fulfilling his expectations and needs. Before submitting the candidates' curriculum vitae to Mr. Roberge, the consultants discuss the specific context of the project at ABS Canada, as part of a brief presentation they have prepared.

Jean Roberge is impressed by the presentation. But, judging from his comments and questions, he is still very concerned about finding a project leader with solid expertise and in-depth knowledge of the ABC software package.

Although he is a little surprised by some of the ideas put forth in the consultants' presentation, Jean Roberge is pleased to see that several projects similar in nature and scope to the one planned at ABS Canada have been successfully implemented in other businesses with the support of the consulting firm, as proven by the candidates' portfolios and their firm's previous achievements in the area of deployment of ABC solutions.

After the meeting, Jean Roberge carefully reads each of the three curriculum vitae and reviews the strong points of the presentation and the discussion with the consultants. Who should he choose?

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Question:

1. In your opinion, what should be the key points in the consultants' presentation to Jean Roberge?
2. Jean Roberge has asked you to help him review each of the three curriculum vitae in the appendices and to formulate your recommendations in accordance with the needs of ABS Canada. Of course, you must justify your response, while taking into account Mr. Roberge's point of view, which he expresses as follows:

I had imagined the role of project leader as centred more on technological solutions. In my experience, technical people are rarely interested in the soft organizational dimensions of IT projects. I don't think organizational questions should be too problematic given ABS Canada's extensive experience in systems implementation. Our main challenge is that we are not very familiar with the ABC software package and we need to act fast.

We strongly suggest that you prepare an appendix to your presentation containing a list of questions that you would like to ask the candidates in the event that Mr. Roberge decides to meet with them.

2010-06-14

Appendix 1

Curriculum Vitae of Candidate A for the Position of Project Leader

Career profile

Mr. A has over 12 years experience working for large service and R&D companies in the private and public sectors in various fields including IT, operations, quality assurance, continuous process improvement and labour relations in the private and parapublic sectors. Over the last eight years, he participated in several ABC development and implementation projects as a project manager. His key skills are project management, procurement, change management, business process re-engineering, process re-engineering, knowledge management, IT project management office and business development.

Types of intervention

- | | |
|--|---|
| <ul style="list-style-type: none"> ➤ Management consulting ➤ Process analysis ➤ Needs analysis ➤ Organizational impact assessment ➤ Strategic planning ➤ Technical change management | <ul style="list-style-type: none"> ➤ Project management ➤ Systems integration ➤ Contingency and succession planning ➤ Systems conversion and interface ➤ IT operations ➤ Auditing |
|--|---|

Skills

Business sector:	Media, aerospace, government services
Equipment and environments:	Windows 2000, Windows NT
Database:	Oracle
Tools:	MS Office 2000 Suite, Visio, FrontPage, Lotus Notes, Outlook, Internet Explorer, Netscape
Methodologies:	SHL Transform, CGEY e-Speed
Software packages and solutions:	ABC

Education

1990	Bachelor's in business computing	Université de Sherbrooke
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Upgrading

2001	ABC IMPLEMENTATION	CBT, Cap Gemini Ernst & Young
2000	ABC CertificationCC	ABC Academy (Boston)
1999	Various project management courses	SHL, EDS and CGEY
1998	ABC START	ABC Canada (Montreal)

Appendix 1

Curriculum Vitae of Candidate A for the Position of Project Leader (cont'd)

Mr. A is the project manager for the implementation of ABC (FI, CO, SD, MM, PM) and is responsible for all deliverables and all of the activities carried out by a 24-member team during various phases, including project preparation and planning, overall design, execution, final preparation and deployment. Implementation was carried out in ASP (application service provider) mode. In addition to overseeing medical-administrative processes, he is also in charge of change management deliverables and the training of end users. To date, the client has been very satisfied with his services.

Environment: ABC, Windows Novel, Oracle, MS Office 1998, Explorer

Large service enterprise

He was the project manager for the implementation of ABC (FI, CO, PA, MM, SM, SD, PS and HR) and was responsible for all deliverables and all of the activities carried out by a 23-member team during the project preparation and planning stages as well as overall design. He shared these responsibilities with the client's project manager. He was also responsible for managing a \$4.5 million budget. According to the client, the project, which involved 400 users and required the re-engineering of several business processes, complex interfaces and conversions, progressed very well. At the end of the overall design, the client decided to delay the project and prioritize the implementation of the ABC Human Resources and Payroll project. This project will be necessary once the ABC project has been completed, sometime around September 1, 2002.

Environment: ABC, Windows NT, Oracle, Remedy, MS Office 2000 Suite, Netscape

Large media enterprise

As project manager, he oversaw the review of strategy, roles and responsibilities of the ABC support department. His recommendations were designed to improve user services, ABC user rates and the return on investment.

Environment: ABC (FI-CO, MM, PS, BW modules), Windows NT, Oracle, Remedy, MS Office 2000 Suite, Outlook

Appendix 2

Curriculum Vitae of Candidate B for the Position of Project Leader

Career profile

Mr. B is a senior consultant in project management with close to nine years experience in information technologies and a master's degree in operations and decision systems. His career consists of managing large-scale development projects. His profile, firmly rooted in respect for objectives, effective management of client relations and teamwork, has brought success to all of the projects he has led, the appreciation of his clients and the respect of his peers. He has successfully led and recovered a number of projects in various industries, including food distribution, finance, insurance, pulp and paper, energy and government. During the course of his mandates, he has developed and acquired the following strengths: planning and organization, budget maintenance and justification, client follow-up and project leadership.

Types of intervention

- | | |
|---|--|
| <ul style="list-style-type: none"> ➤ Project management ➤ Functional architecture | <ul style="list-style-type: none"> ➤ Project control and recovery ➤ Technical consulting |
|---|--|

Skills

Business sectors:	Food distribution, financial services, pulp and paper, government, electricity and insurance
Equipment and environments:	AS400, Windows 95/NT, VAX/VMS – Alpha, CICS, NOS, MVS, VSAM, JCL, UNIX, Cyber, IBM, TSO/ISPF, IDD, DMLO, OS/2, Unisys 80, TIP 30, HP-3000, AMDAHL
Languages:	AB+, COBOL II et 85, PL1, Fortran, C, C++, Visual Basic, Speedware, Excelerator, Image, Pascal
Databases:	DB2, MS Access, Sybase, Open Ingres, IDMS/DB, Total, SGBD Turbo-Image, dBASE III+ and IV
ERP integrated systems:	ABC, Cincom
Tools:	Lotus Notes, Word, Excel, PowerPoint, Stairs, SDFII, Playback, File-AID, Panvalet, Clist, Debug, Intertest, Librarian, TQL, GALO, Samna, Lotus 123
Methodologies:	Concert, SILVERRUN-DFD and MCD

Education

1989	Master's in IT management sciences	HEC Montréal
1987	Bachelor's in computer science	Université Laval

Appendix 2

Curriculum Vitae of Candidate B for the Position of Project Leader (cont'd)

Upgrading

2002	ABC Implementations
2002	ABC – Tools in Detail
2002	ABC Business Integration Seminar (Certified)

Relevant recent professional experience

Large service enterprise

Management of an integration project for administrative services involving corporate services and three business units. The project's aim was to offer the same range of services and the same level of service in order to procure efficiency and financial gains, while respecting the needs and specificity of the internal clientele.

- Implement efficient and proven project mechanisms.
- Lead a team composed of a dozen experts and six partners.
- Implement a project methodology in a particular context of administrative services.
- Assist the project manager in decision-making.
- Plan, coordinate and control the project.
- Participate in the development of deliverables.
- Carry out quality assurance of documents.

Environment: Word, Excel, PowerPoint, MS-Project, Project Workbench

Large telecommunications enterprise

Recovery management of the project to replace the enterprise's 12 legacy systems with the ABC integrated solution in ASP mode. The modules implemented by the ITM team are: HR, PAYROLL, CS, SD, MM, FI and CO. The Big Bang implementation approach was used.

- Replace the client's internal project leader 12 months before deployment (total duration of the project estimated at 24 months).
- Lead the development team (AB+ configuration and programs) composed of some 30 people.
- Create an efficient work environment within the project team.
- Plan and monitor application start-up within the prescribed timeframe.
- Environment: ABC, DB2, Windows, MS Access, Word, Excel, PowerPoint, MS-Project.

Appendix 2

Curriculum Vitae of Candidate B for the Position of Project Leader (cont'd)

Large food services enterprise

In the context of this project, the enterprise began implementing the ABC software package for the grocery sector. The ITM mandate was to carry out analysis, programming, functional tests, support to integrated testing and post-implementation support for the development and reports for the grocery sector. Development represented an effort of close to 2,800 person days over six months by a 28-member team.

- Build a highly-skilled team of 28 ABC analysts and AB+ programmers.
- Plan within the limited timeframe of the project.
- Lead the team for analysis, programming, testing and post-implementation support.
- Deliver the project on time.
- Ensure high-quality deliverables.

Environment: ABC, AB+, AS400, DB2, Windows 95, Lotus Notes, MS Access, Word, Excel, PowerPoint.

Aerospace enterprise

Lead two outsourcing teams comprised of some 15 people working to complete the final tasks before the year 2000.

- Quickly plan the final year 2000 activities of the two ITMP outsourcing teams.
- Prepare the transition plan composed of over 30 activities.
- Finalize the contingency procedures in case of problems.
- Develop and implement an effective communication plan.

Environment: VAX/VMS, Windows NT, ERP CINCOM.

Appendix 3

Curriculum Vitae of Candidate C for the Position of Project Leader

Career profile

Ms C has a bachelor's degree in administrative sciences, accounting option. Upon completing her studies, she joined the accounting firm Samson Bélair/Deloitte & Touche. She has been a member of the Quebec Order of Chartered Accountants since 1990. As an auditor, she has worked in various sectors, including health, banking and pharmaceuticals. She then turned to private enterprise for her work as a controller. In charge of all accounting operations, she was also responsible for special projects, such as the implementation of an inventory module. Over the last eight years, she developed in-depth expertise in process analysis and ERP implementation. In addition, she has completed several ABC software implementation projects, which allowed her to develop her methodological approach, her management skills, her extensive knowledge of Oracle applications, particularly the General Ledger, Purchasing, Inventory and Order Entry modules, as well as Accounts Payable, Accounts Receivable and Project Management and the eBusiness suite (iStore, iPayment, iMarketing, Marketing Online and Sales Online). Lastly, she has on several occasions carried out the analysis and definition of business processes, analysis and implementation of charts of accounts and items, as well as project management, including development and monitoring of the implementation calendar, tracking work progress, resolving issues, managing change requests, assisting and coaching the client's project leader as well as the implementation team.

Types of intervention

- | | |
|--|---|
| <ul style="list-style-type: none"> ➤ Project management ➤ Team management ➤ Process analysis ➤ Strategy and test preparation | <ul style="list-style-type: none"> ➤ Information systems integration ➤ Systems migration ➤ Product selection |
|--|---|

Skills

Business sectors:	Procurement, accounting, distribution, inventory management, municipalities, telecommunications
Languages:	SQL
Methodologies:	Ascendant (PwC)
Software packages and solutions:	ABC (General Ledger, Order Entry, Inventory, Purchasing)

Appendix 3

Curriculum Vitae of Candidate C for the Position of Project Leader (cont'd)

Education

1990	Member of the Quebec Order of Chartered Accountants	
1988	Bachelor's in administrative sciences, accounting option	HEC Montréal

Upgrading

2000	Organizational Analysis and Design (OAD), Montreal
1998	ABCFast, Montreal
1998	<i>Reengineering: The Leadership Perspective</i> (Michael Hammer), Boston
1998	<i>Transforming the Supply Chain: Integrating to Serve the Final Customer</i> (Michael Hammer), Boston
1998	<i>Succeeding with ABC</i> (Boston Academy)

Relevant recent professional experience

Telecommunications Inc.

The main objective of the project to review the company's chart of accounts was to create a shared global chart of accounts for the company's 40 units. The second objective was to standardize the chart of accounts in order to ensure conformity of their respective charts (known as mapping), the concept of parent/child and the presentation of financial statements. As project manager, Ms C's responsibilities were to:

- develop and monitor the work plan;
- document needs related to accounting and financial reports, determine the strengths and weaknesses of the current chart of accounts, review each segment of the chart of accounts and document its use, review the parent structure of the "natural account" segment;
- recommend a new structure to respond to all needs and evaluate the impact of this recommendation on the various external systems;
- produce a user guide, in collaboration with Teleglobe, including definitions for each of the natural accounts;
- develop conversion and implementation strategies for the revised chart of accounts;
- coordinate and participate in the analysis, design and construction of financial reports and participate in related unit tests;
- coordinate and participate in the production of a new chart of accounts and provide support for the first end-of-month.

Appendix 3

Curriculum Vitae of Candidate C for the Position of Project Leader (cont'd)

Telebroadcast Inc.

As project manager, Ms C coached the company in its invitation to tender for the selection of a new accounting system and performed the following tasks, among others:

- assisted in writing the invitation to tender for the selection of an information system, including preparing the list of needs, presentation of the client, etc.;
- analyzed the bids of the suppliers in order to proceed with an initial preselection;
- attended, along with the resources of Telefilm Canada, the demonstration of the applications of the suppliers retained;
- prepared and presented the recommendation for the choice of a supplier;
- submitted an implementation calendar for the chosen solution;
- supported all communications with the suppliers;
- coordinated the work team as well as developed and managed the work schedule and work progress.

She served as the project leader of the ABC General Ledger module during the implementation of four modules (General Ledger, Accounts Payable, Purchasing and Accounts Receivable). Within the framework of this project, deployment was carried out in five countries in North America and Europe. Her main responsibilities with regard to the General Ledger module were to:

- analyze current processes;
- analyze mismatches between the processes and functions of the Oracle General Ledger application;
- establish the parameters of the application;
- analyze and make recommendations regarding the structure of the new global chart of accounts;
- define a multiorganizational environment;
- analyze discrepancies between standard Oracle reports and targeted needs;
- prepare and present prototypes (CRP);
- define the test strategy and prepare integrated test plans.

Environment: ABC

Parapublic service centres

Evaluate the feasibility of an integrated customer management system designed to improve the quality of services offered, optimize business processes and maintain a single customer file with clinical and administrative data that is intact, relevant and easily accessible by all players. Develop a change management strategy based on the organization's capacity for change.

Large accounting service company

Coordinate the development of a three-year master plan for the information technologies department:

- diagnosis and inventory of technological needs related to the strategic plan;
- development of technological orientations;
- draft of target architectures.