

PLOT your Innovation Strategy

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Leveraging project management for excellence, growth and transformation

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1.1 Abstract

1.1.1 Balancing Innovation and Execution (BIE)

This paper tries to dwell at the above topic, to explain, how organizations can effectively harness innovation that can play an active role and help organizations, stay competitive. The biggest question, how fine balance can be achieved, between Innovation and Execution? As a support group Innovation, needs business to fund and show them ROI. Quoting “Maurice Holland”, Innovation is best described as a “*Linear Model*” [¹]; Innovation is a best form of security for organizations and it’s an insurance against competition and economic depression. This paper suggests a framework upon, which innovation can thrive in organizations.

1.2 Keywords

Innovation, Quick wins solution, PLOT

1.3 Introduction

This paper attempts to explain, how organizations can effectively harness innovation as a strategy using right project management practice to bring in sustained bottom-line improvements. This paper does explains about a concept known as *PLOT* that is being used to sustain the innovative practice, within the IT group, whose primary focus is to bring in sustained value to the business, using technologically innovative solution.

1.3.1 Backdrop:

Most of the support organizations, where there is no direct revenue and that require corporate funding to sustain, will be under scanner always, particularly in turbulent economic situation. Setting up of an innovation group, does fall under this category. This paper has a backdrop, for such support group who are always under a scanner to run their shop lean and mean; Such support group, where there is no direct revenue and which require funding to sustain, will be first to get axed, when it comes to budget freeze. This paper attempts to explain how such a dedicated innovative support group is able to deliver quick wins under trying circumstances to bring in sustained results; this has been found successful and we have grouped a framework named *PLOT*, under which this innovation group can be incubated.

1.4 Scope

This paper is limited to the specific practice of how the innovation concept is practiced using a *PLOT* methodology, quoting specific case study.

¹ Benoit Golden, The Linear Model of Innovation (II): Maurice Holland and the Research Cycle, Montreal, 2009



1.5 Result

The results summed below are pertaining to the case study detailed in this paper.

- ◆ Incremental, but quick wins that can bring in substantial benefits to the bottom-line;
- ◆ Improved Productivity
- ◆ Decreased Employee Turnover
- ◆ Improved Customer Satisfaction

1.6 Business Value

Significant \$\$ savings that bring value to business; Along with the case study, value to business is better highlighted, in the subsequent [section](#).

1.7 Key Differentiator

Using of a systematic framework named *PLOT* under the guidance of right project management practice.

1.8 Case Study

There certainly is a need for running your shop lean and mean; Support shops that exists within the organization will be looked at closely and funding or winding up these shops, will be first sought after question, during turbulent economic situations. Here is where we used Innovation, to deliver quick wins under trying circumstances to bring in sustained results.


This case study will explain how we have put in a practice of *PLOT* framework to systematically harness innovation and bring in innovative technological solutions to showcase quantifiable business results. During the recent recessionary period, we had invested into this practice and brought in innovative quick win solutions that helped in cost optimization and cost saving initiatives. This paper would like to enumerate the *PLOT* framework for one such solution.

1.9 Challenge

1.9.1 Backdrop

We are in the Business Processing Outsourcing Space, providing value added service to our clients. In one of our account, situation demanded a solution that can better the overall customer experience and satisfaction. This client has significant presence in global technology B2C space.

We were serving customers using our client provided chat solution. The larger problem statement was stemming from the fact that this account had high customer dissatisfaction. So our innovation group was brought in to look at, is there an opportunity to do things differently, where it can bring in a positive customer



experience? Our approach was to enumerate all pain areas, also look into people, process and technology. Those that were identified specific to this project are listed below, as our first step in our *PLOT* framework.

1.9.2 Pain

- ◆ High Handle time, leading to reduction in Customer Satisfaction (CSAT);
- ◆ Cumbersome manual process that was resulting in high rate of errors,
- ◆ Quality scores getting affected
- ◆ Low customer satisfaction;
- ◆ Last but not least, stress to associates as a result of higher AHT and poor CSAT scores, contributing to higher attrition and increase in hiring cost.
- ◆ On boarding new associates taking longer handle time.

In short, this was becoming cyclic and need of the hour was to salvage the situation and bring in right solution to the problem, leading to course correction.

1.9.3 Leak

While looking at the problem statement and customer pain points detailed in “Pain” stage, it helped to proceed to the next stage of looking at “Leak(s)”. Starting from the tool, fine tuning the process, required an innovative quick simple solution that can better the situation and bring in considerable improvement. Identified Leaks, paved way for the following opportunity area that can be bettered:

- ◆ Stream line response to customers
- ◆ Centralized repository
- ◆ Tool that will help associates to be mindful of their grammatical and spelling mistakes
- ◆ Simplify and enhance user interface
- ◆ Tool to reduce learning curve
- ◆ Automate mundane routine tasks, auto fill
- ◆ Reduce manual errors, during standard response

1.9.4 Opportunity

Before jumping into the opportunity, little deviation and a brief backdrop (like a “taking viewers to “flashback” in most of our movies).

1.9.5 Backdrop:

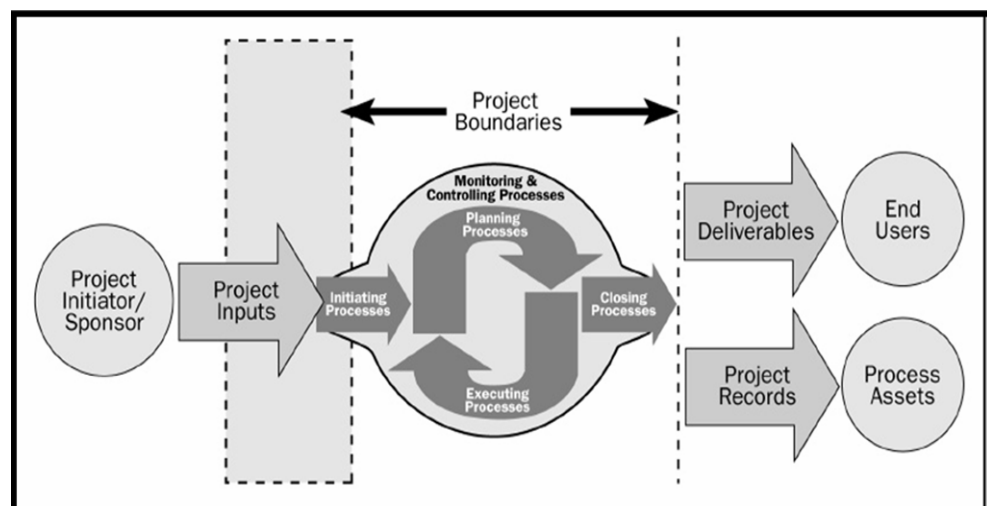
Brief look at the current landscape & environment, would help the readers get answer, why at all we need a solution like this. Hopefully, this short backdrop, would help answer that question. The tool and technology that supported the current process, of providing chat support was given by our client and we were using their tool, which had inherent shortcomings. Any modification, upgrade to the existing tool, had global implications as the same chat tool, is being used by multiple outsourcing vendors like us, to support our client's global customer support business process.

The situation we were in had two options. One to go back to the client and tell them that we are helpless and if following modifications were done to your existing tool, we could look at enhancing the process and turnaround the situation. Other option we had was a big Opportunity, to go back to the client and say, we have a solution in place. There was a big opportunity in front of us to bring a turnaround through innovative technology solutions that can bring in quick wins. As a step 2, cascade this as a global practice, and bring in improvements, globally across multiple vendors.

Continuing to tread the next stage of PLOT framework, we approached the whole problem statement into an opportunity; when you start analyzing pains, there were Leaks, which when effectively plugged, can bring in a wonderful opportunity that can be solved using Technology.

1.9.6 Project Management

Using the Project Management practice, we brought this opportunity into our standard project management practice radar.



Project Management Process Group, mapped to Plan Do Check Act Cycle²

The project was formulated with defined objectives, the proposed benefits the project is intending to bring and the organizations willingness to invest in the project and resources were taken up with project governance. Approvals obtained and thus Project “*Sprite*”, “*Spell It Right*”, was conceived.

² PMBOK 3rd Edition – Project Boundaries

1.9.7 Technology:

The technology solution *Sprite* was designed, where a chat framework window would reside on the associate's desktop, which will be used by associates, as the primary interface tool. While the client given chat tool would continue to be the primary tool, *Sprite* was designed as follows:

Framework that would mimic a chat response window with functionalities that were not available in client's chat tool was provided in this newly conceived application, *Sprite*.

Sprite had the following capabilities:

- ◆ Grammar and Spell checking capability
- ◆ Once the spell check is completed, the "Send" button will automatically push the chat transcripts to client's chat window.
- ◆ Completely configurable and create your own standard responses, no need for associates to type.
- ◆ *Sprite* had centralized repository of standard chat response.
- ◆ Launch websites or application automatically, instructs to fill standard forms or fill in standard texts.
- ◆ In addition to regular text, you can also use dynamic variables (day, time etc.) and insert special keys
- ◆ Designed a template, where frequently used chat scripts can be posted in *Sprite*, which will then be used by associates for responding to customers.
- ◆ Excellent UI design, that helped ease of use. Features like usage of Intellisense, which will help associates to easily search snippets
- ◆ The UI was matched up to overlay on top of the client chat response window, so that associates don't feel this as a separate tool, but had all the luxury of features, which was hampering their productivity.

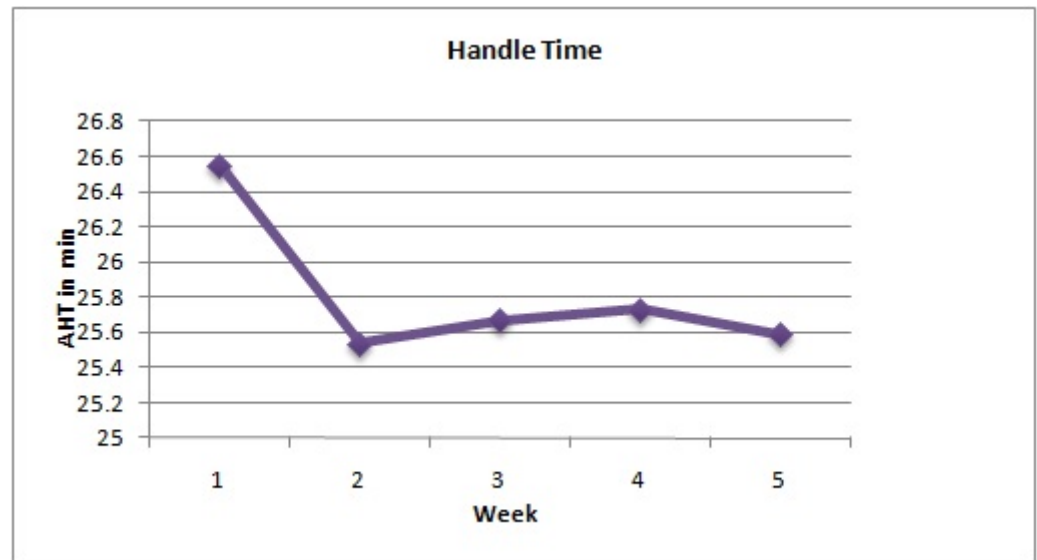


Every time when associates chat with customers, they have to use their name, email address. These details which are available in client's chat window, was automatically pulled and replaced in the snippets, whereby it helped in reducing handle time and reduction in typographical errors.

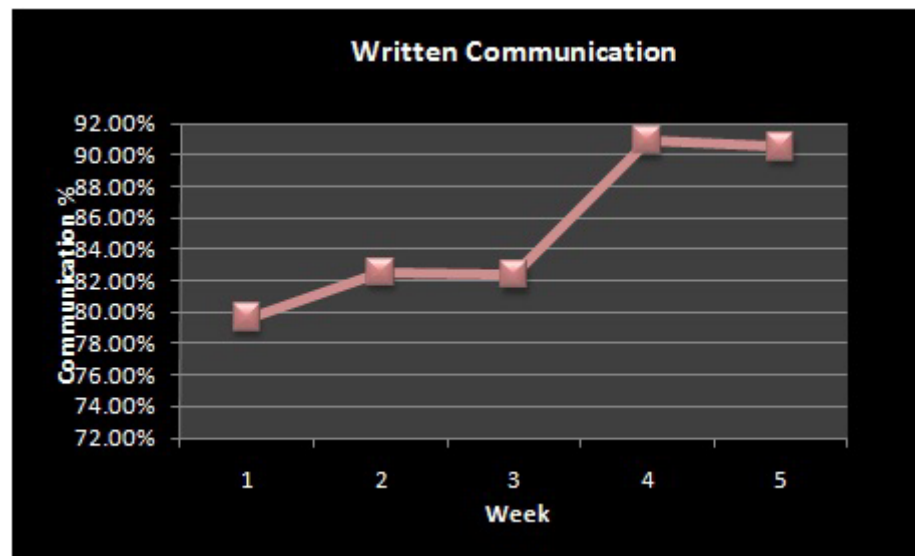
Most Simple light weight app (< 5 KB) of memory space, that is simple to install and configure.

1.10 Business Benefit:

- ◆ **Business Impact** - Reduction in spelling mistakes will have positive impact on Handle Time, for the program.
- ◆ Handle Time Improvements



- ◆ **Financials** - Expected reduction in defects from 12% to about 5%, thus bringing down the defects rate by about 60%
- ◆ **Quality** – Quality scores are expected to improve, as primary defects were on spelling mistakes encountered during chat with customers.



- ◆ **Reducing Manual Effort** - Centralizing and version controlling frequently used chat snippets, avoiding multiple excels to refer to the chat snippet;

- ◆ **CSAT** – Reduction in spelling mistakes will have positive contribution and is expected to improve the CSAT by 6 % to 8 %;

Above are the pilot data that is shared and statistical test run, showed significant improvements in vital metrics that measures customer support business process. Significant reduction in Handle time, weekly feedback generated and monitored continuously to look at customer feedback to this new process and solution rollout. No negative customer experience or complaints, or from the user group, In fact the user group was so happy, as the solution *Sprite* brought in significantly simpler to use tool, that had answers to all their problems, that was hampering productivity.

Complete rollout across multiple processes showed significant impact and reduction in Handle time. Post rollout, there was an 8% improvement in the customer satisfaction scores, which was a very positive outcome, as we were able to provide much better service. Also the defect rate had reduced by 7%, which led to the overall positive customer experience.

Employees who were using the tool, had in a survey pointed out that the new solution *Sprite* was aiding their productivity and helped them to better support customers. The change was positively, welcomed (but not without its cousins like initial resistance, those who were change averse)

Overall financial impact of this solution rollout showed an annualized operational savings of \$250K. Due to increased capacity additional business opportunity \$500K, as we were in a position to handle more business, with addition in headcount.

1.11 Challenges Overcome:

- ◆ Environment – beyond your control – most of the time you may not have the luxury of having the perfect setup to simulate and work with, when working on such solutions, that require quick turnaround solutions.
- ◆ Endurance – As PMP guidelines suggest, confronting the problem is the best approach. Problems appear from everywhere, while working on such projects.
- ◆ Risk – Stakes are always high and so is the risk;
- ◆ Unknown Unknown's – Project entire lifecycle run on almost un-tread paths, tools, technologies, deployment environment, that one has learn quickly.
- ◆ Motivation – Managing and motivating the team is always a greater challenge, while working in the project, will always be racing against time and are soon exhausted.
- ◆ Test Bed – Creating a replica of live scenarios in a test environment was quite challenging, as problem you encounter in live is not the one that you can simulate in a test bed.

1.12 Critical Success Factor

- ◆ Success was not easy, as new solution bring around change, which has its cousins fear, aversion to change, negative change agents have to be overcome systematically; Key was to win the heart of the core user group, who are the affected. Accordingly this effect is termed as the “*emotional connect effect*”, when you are able to strike a chord to this emotional connect, you are almost there;

- ◆ Then the “word of mouth” effect; We were able to make the solution speak for itself and adoption rate was pretty quick as the word of mouth spread on its own, among the user community, who can be wooed to act as positive change agents; In this case, “bottom-up” effect has its own positiveness in some situations “top-down”, can have a negative effect.


1.13 Lessons Learnt

- ◆ Design a solution that can be “KISS”(ed) [Keep It Simple and Short] – Don’t complicate. Remember Albert Einstein’s quote, “Make everything as simple as possible, but not simpler”.
- ◆ Emotional Connect – The value of this cannot be undermined
- ◆ Bottom-up effect – This is really a crucial in the success of such projects. Rather than pushing it hard, solution should be selling on its own;
- ◆ Patience – Be prepared to walk the path alone (Initially); you may have to be confront the doomsayers, who will be making a mockery with your concept and ideas. Remember, you are dealing with people. Don’t approach as if you are dealing with animals, *“as animals are such agreeable friends - they ask no questions, they pass no criticisms”*
- ◆ Believe strongly in what solution is conceived (negative critics are present everywhere)
- ◆ Solution should speak for itself, to woo positive change agents – identify, handpick and surround with positive change agents.
- ◆ Believe and propagate effective Project Management practices across all levels – It’s not proprietary to development team, alone.
- ◆ Supportive senior leadership sponsor, to run an innovation / value creation shop – Value of a strong sponsor and support, is required, who will be able to support and provide leadership to this group. Most of the times, benefits take time to reap.
- ◆ Empathy Technologist –Solution should be selling on itself, from a user-perspective. While solving customer’s problem let the new solution, appeal “empathetically”.
- ◆ Skill set - Form a team who can understand the “emotional connect”

1.14 Conclusion

Having found success in quite few innovative projects, we have formulated what is known as *PLOT* framework, which we have practiced and lived these values during this recent recession. Using right project management practice and adapting *PLOT* framework, we were fairly successful, which helped us bet on right horses (projects) that can get you executive buy-in;

Quoting Warren Bennis, American Scholar, “Innovation — any new idea — by definition will not be accepted at first. It takes repeated attempts, endless demonstrations, and monotonous rehearsals before innovation can be accepted and internalized by an organization. This requires *courageous patience*.” These are golden words and every single word, convey the complexity.



Certainly convincing business to fund such a shop, can't be sold on only courageous patience, which is why we are not banking on patience, but use an a framework named *PLOT* which is agile² (squared) approach, we were able to demonstrate much needed \$\$ benefits and bottom-line improvement; that helped funnel the funding Innovation lab within IT group.

Innovation can be a powerful means to deliver quick wins under trying circumstances to bring in sustained results. Don't fear being slayed, looking at it positively, "Slaying sacred cows makes great steaks".

1.15 References

1. ¹ Benoit Golden, The Linear Model of Innovation (II): Maurice Holland and the Research Cycle, Montreal, 2009
2. ¹ PMBOK 3rd Edition – Project Boundaries

1.16 Authors Profile:



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