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CX ANONYMOUS, SEASON 1, EPISODE 4

The Stakeholder Game: Project Management

Summary

Amber, Scott, and Amy discuss stakeholder alignment, communication, and tools like Monday.com for successful customer experience projects in CX Anonymous.

Questions Answered

- What are the common challenges teams face when implementing customer loyalty programs?
- How can misalignment among internal teams impact the success of loyalty initiatives?
- What strategies can help ensure successful stakeholder management in loyalty projects?

HIGHLIGHTS

On Project Misalignment: "I think the biggest reason is misalignment among the team and that could be due to conflicting or differing goals." — Amy Forshee [02:18 - 02:25]

On Continuous Realignment: "Life changes. Life evolves. People change, people evolve. Other things come up, things break. There are different things that have to happen." — Scott Shurson [03:57 - 04:05]

On the Role of a Project Manager: "It's not just managing tasks. It is about building relationships. It is about listening to all stakeholders in the project." — Amy Forshee [06:42 - 06:50]

On the Importance of Documentation: "Writing things down seems pretty basic, but it goes a long way to remove the ambiguity from what someone thought they heard." — Amy Forshee [04:50 - 04:55]

On the Value of Communication: "Communication is key, right. It is the foundation for building relationships and trust. It helps for conflict resolution." — Amy Forshee [19:28 - 19:35]

On the Impact of Vendor Processes: "The vendor's process, or lack of, can also dramatically affect a customer's success." — Amber Collins [18:18 - 18:23]

On the Benefits of Pre-Alignment: "Making sure that everyone is aligned would save us a good month out of that schedule." — Amy Forshee [17:00 - 17:05]

TRANSCRIPT

Amber Collins [0:05 - 0:38]: Welcome to CX Anonymous, the series where we provide tactical advice on successfully executing customer experience and loyalty. We don't care who you work for, just how it got done. On this series of CX Anonymous, we're continuing the discussion of the stakeholder game. This is all about getting your projects out the door. So I'm your host, Amber Collins, product marketing manager here at Annex Cloud with Scott Shurson, product solutions director, and our esteemed colleague, Amy Forshee, VP of our project management office. So thanks for joining us, Amy. Please tell us a little bit about yourself.

Amy Forshee [0:38 - 1:27]: Glad to be here. I've been in the project management field for over 20 years now. Most of it has been in the software development industry. Key areas of focus have been managing cross functional teams and basically whatever it takes to bring products to market, as well as supporting the customer journey and all of the processes related to that. At the beginning of this year, I was brought into Annex Cloud to establish a project management office and the primary goal is to develop best practices and processes to make sure that we are delivering value to our customers throughout that journey. My team currently includes projects and implementation managers who are responsible for getting our customers live before we turn them over to customer success to live throughout their journey.

Amber Collins [1:28 - 2:18]: An extremely important role, especially when we talk about a loyalty initiative that can be so complex and so ingrained into the rest of the organization. So we're super happy to have you on board. So of course, this season's topic, managing stakeholders we all know is a science, it's an art. Probably something very close to your heart, Amy, considering all that you have to get done. And so you've brought in so many loyalty initiatives to life for our clients and you assist in creating process in order for our own internal initiatives. So I'd like to open up our discussion with a few questions specifically about implementing loyalty programs. So no names, no blame. So it's the ex anonymous but what is the number one reason why you see teams having a hard time implementing projects that could be wide like loyalty?

Amy Forshee [2:18 - 3:15]: I think it's, you know, it applies to all projects, really. In general, I think the biggest reason is misalignment alignment among the team and that could be due to conflicting or differing goals. As typical. Like I said, with any project, internal teams have their own objectives and what they're trying to accomplish, right? For example, sales and marketing wants a product that's easy to sell

with clear messaging and a value prop. Product management wants feedback from customers on what problems they need to solve and so they know what to build and how to build a roadmap development is focused on how to solve the what and the why that product management has described. And the CFO and CEO want to be profitable. Right. And so each of these teams is going to approach the project from what they want to accomplish. And it's important for the entire team to have a collective view of those goals and to understand where everyone is coming from.

Amber Collins [3:15 - 3:26]: Absolutely. Scott, how have you seen teams struggle in implementing, especially now everything is tech, but especially tech heavy projects?

Scott Shurson [3:27 - 4:24]: I mean, similar to what Amy was saying, everybody's got a conflicting problem. One of our earlier things was about aligning everybody's pain. And I think that where products tend to go off is we might have aligned a pain or tried to solve the pain at the beginning, but then we don't keep looking back like, what else is coming up? What else is changing, what conflicts are new to the organization? A lot of times the struggled projects are the ones that just, you know, treat it as a one time event. And then now everybody, you know, has a, you know, smooth sailing, clean slate. Everybody's ready to go and all aligned on the same page. No. Life changes. Life evolves. People change, people evolve. Other things come up, things break. There are different things that have to happen. So I think that real, that continual realignment where a lot of projects start to, to get off and kilter.

Amber Collins [4:24 - 4:34]: I agree. So then what would make a team more prepared than the average team? How can teams go into this and really knock it out the park?

Amy Forshee [4:35 - 5:28]: A couple of things. You know, it's obviously important to understand everyone's perspective, and having open and transparent conversations around expectations is really key to success. If the team is not aligned on the expectations, then assumptions are made, and that can lead to misunderstanding, conflict. I like to make sure that everything is clearly documented and agreed upon by all stakeholders to avoid that. Writing things down seems pretty basic, but it goes a long way to remove the ambiguity from what someone thought they heard. And then just in general, at Annex cloud, we are implementation experts. We've done this time and time again, and we get better every time. We're learning from the lesson to Scott's point earlier, those pain points to make that process better, we're applying those lessons learned.

Scott Shurson [5:28 - 5:58]: So then how do you take some of those lessons learned and break implementation manager out of that director of timeline mentality? Because everybody's kind of building, everybody's kind of doing so. A lot of organizations just look at a PMO or an implementation manager as just the person who is the keeper of the timeline. Have you done your jobs? When are you going to do your jobs? Have you done your job? When are you going to do your job? Beyond those like two questions, how do you keep people on track?

Amy Forshee [5:58 - 6:01]: The customer themselves are interesting.

Scott Shurson [6:01 - 6:40]: All of the above. Remember, it's all of the stakeholders. Because again, the PMO is really that needle at the top, that person at the top who's kind of directing everybody with the little strings and all of that. A loyalty project has a lot of stakeholders with it, and it can be a business transformation rather than just a setting up of a new software. Right? So as a project manager, you are more than just a taskmaster. As a project manager, how do you break the team out of the mold of. We show up, we keep to a timeline, and we ask two questions. Did you do your job? When are you going to do your job?

Amy Forshee [6:42 - 7:55]: I think it's important for a project manager to be well rounded, right? It's not just managing tasks. It is about building relationships. It is about listening to all stakeholders in the project. It is about providing visibility to everyone from our side on the annex cloud leadership team, to all of the customer stakeholders into progress, potential risks that might impact a project, etcetera. Our project managers within Annex cloud have that larger role of building those relationships, making sure they are providing visibility into anything that may derail a project. Right. Active risk management, whether that be providing that detailed project plan in Monday.com with visibility to all those stakeholders, like I said, or back to the documentation point, making sure that requirements are clearly documented. Our risk register is up to date. Our project meeting minutes are published. Right. Just again, removing that ambiguity from the project in general.

Scott Shurson [7:55 - 8:28]: So what I'm hearing is that it's not a one time event to say are we all aligned? It's an evolution. It's difficult, but that's where season PM comes into play. It's somebody that has the experience with the suck. Where do you see the loyalty based project manager or just an industry wide project manager finding? You find people who are like, I went to college for this, or do you find people who are have just been as a part of a lot of really cruddy things and then get really good at solving problems?

Amy Forshee [8:28 - 9:39]: Yeah, it's interesting because, you know, I don't, when I'm hiring for new project managers, I don't necessarily look for somebody in the industry, although that is a super added bonus. I am looking for that. The foundations of being able to be obviously manager project. But that relationship building piece, I mean, when you think about our typical implementation timeline is four to six months long. That's a long time you're going to be working with a project team, right? And it's not just doing a flyby of, you know, to your point earlier, Scott, like check off the tasks as they're done. It's building that relationship, building the trust and the respect among the team. And I look for a lot of those kind of qualities when I'm hiring for project managers as well as other roles in my team, right. I want to make sure that the project managers are approachable, they're trustworthy, they have respect for everyone. Just being able to manage, again, ambiguity, risks, etcetera. So it is truly not just project management skills, but really well rounded person.

Scott Shurson [9:39 - 10:02]: So then let's take something that you mentioned briefly with Monday.com dot PM's back in the day. They use Excel and they use word to track like everything. What does a tool like Monday.com give a PM or somebody who's managing the project? What does it give you to differentiate and help with that overall process? Why choose Monday.com instead of just Excel?

Amy Forshee [10:02 - 11:20]: Well, so the problem that we were running into with Excels and word documents where we didn't really have a way to manage a standard project plan, right. We started with an Excel and everybody basically customized to the way they wanted it or where the customer wanted it, right? So there was no consistent across the team. And when somebody, you know, at my level is coming along to go check the project plan, I don't know where to look because it's not in the same place for every customer. Right. And the problem with that also is you're having to share it either passing it back and forth via email. Right. You have copies that are not, you know, multiple copies. You're not working off a single source of truth. It introduces a lot of confusion. There's just not a lot of consistency. So with implementing Monday.com, it is that single source of truth. We start with a standard template for every customer that gets customized based on varying requirements of the customer. And then like I said, everybody has visibility into it, right, from annex cloud side as well as the customer side. And the customer is able to go in and update their action items, right. And it's all real time accessible via, via web.

Scott Shurson [11:21 - 11:36]: So what is the, maybe the benefit of like a Monday versus like servicenow Kanban board or something like that? Where do you find, like it's easier to share? Where do you find it's easier to keep

people on track? Again, I don't want to. We're not selling tools that we don't.

Amber Collins
[11:36 - 11:40]:

Sell, but we're going to need Monday.com to sponsor this.

Scott Shurson
[11:40 - 12:35]:

You can see the rolling like tally of tips that they're providing us, you know, but you know, there are a lot of tools out there that say we are the, but what I want to try and focus on is it's solving a problem. And that problem is keeping everybody on two organization with two completely different tech stacks and two completely different project management organizations on the same track. So in CX Anonymous, where we have initially focused on solving that customer problem and getting everybody there to align, but with you here, I feel like we have a unique opportunity to say now we have two different organizations that we are trying to combine with unique needs and unique goals and unique challenges. And I feel like the tool that you've selected allows us to do that. And where are some of the benefits of that tool in terms of sharing versus other tools like a shareable kanban board or Trello or something like that?

Amy Forshee
[12:35 - 14:12]:

In evaluating Monday.com, it was a very short time to learn, right? So for people who have not used a tool like this before, it's a very short learning curve, right. It's very user intuitive. So I think that was a goal as well as, like you said, providing the visibility to external customers, not requiring a software license. Right. We don't have to pay for that. The external client being able to actually edit. Also the security of it. Right. The customer can only view what we share with them. So all of our customers data is segmented firewall from each other. Right. So I think those were probably the key areas that we were looking for in selecting Monday.com. and it's a true project management tool. It allows us to create dashboards internally from separate customer boards. So we have that visibility at a leadership level, implementation timelines whatsoever, overlapping for customers where we may have some resource contention. So internal planning is really helped using the money.com tool and it's really easy to generate Gantt chart all kinds of different tools, visibility to stick into a PowerPoint or whatever the need may be. Right? So I think I've not had a lot of experience with you said service now. I mean, obviously we use Jira and Kanban board. I think just the whole package of Monday.com. those were the positive key things that we were looking for as an organization.

Amber Collins
[14:12 - 14:48

]: Awesome. Well, I, as the product marketing manager, also use the boards that are created for our implementation, or rather our product management and product releases. So aside from those tools which, you know, we use daily, that was my point. Right?

How else are we a partner in our customers preparedness for these large projects, right. We've created this process, and it's for the better of everybody. So talk to me a little bit about how our team goes through that process, how we've structured our team so that we are positioning ourselves as the best partner for them.

Amy Forshee [14:48 - 16:17]: Sure. Well, one of the significant changes we made was bringing in project management into the implementation process. Right. So every implementation has an assigned project manager who will stay with that customer through the entire journey. That is a single point of contact for the customer. If something arises that the customer doesn't know who to go to, it's always the project manager. They can track it down. Right. And my team is responsible for helping solution the customer strategy. Right. Based on their requirements. And so, you know, more to the tools in the process, we produce a statement of work to outline the agreed upon deliverables. Right. We put a lot of effort into making sure that program requirements are documented, timelines. We have a racy chart so everybody knows who is responsible for what and making sure we know what is out of scope as well. We're trying to set everyone up for success by setting the expectations at the beginning of the project and making sure they're clearly documented with that statement of work after that. When we go into more of our discovery phase, we use gap analysis to understand where we might need a different solution or an enhancement, our product to fulfill a requirement or a different plan altogether. Right. Do we need to bring in a partner to solve a use case or whatever the case may be? And then again, the detailed project plan in Monday.com. so everyone knows exactly where we are in the process.

Scott Shurson [16:17 - 16:31]: So let me ask the question about you're bringing on a new customer. How often think a customer is coming on and they have not aligned all of what the project is all about? Like, what are we trying to do here? Percentage? Eight out of ten. Five out of ten.

Amy Forshee [16:31 - 16:41]: That's I'm going to go with. From my experience in the last ten months that I've been here, I would say five out of ten.

Scott Shurson [16:41 - 16:59]: Five out of ten. So if I can kind of play that back. Half of the customers coming on board have not aligned internal teams using that number. About how long would you say you could save as an organization coming in? They could save by pre aligning.

Amy Forshee [16:59 - 17:10]: You know, like I said, our standard implementation is probably four to six months. And I would say making sure that everyone is aligned would save us a good month out of that schedule.

Amber Collins
[17:10 - 17:11]:

Yeah.

Amy Forshee
[17:11 - 17:11]:

Yeah.

Scott Shurson
[17:11 - 17:18]:

25 business days could potentially be saved by free alignment and time is money.

Amber Collins
[17:18 - 18:31]:

We all know that. So with that, I would love to wrap up our conversation, as we always do with the top takeaways. And so, Amy, you said something that, you didn't say this verbatim, but what I got from it is that the vendors process, or lack of, can also dramatically affect a customer's success. So our process can affect a brand's success or time to value or, you know, the success of the implementation. And so, so I would say that then for me, especially since you said that half of the teams that you've seen have not quite been aligned, that not only do we need to think about alignment on all sides, but ask about the process. Ask about the process and make sure that your team understands it is aligned with that as well. Because with the wrong vendor, with the wrong process, it's going to turn something that you thought was going to be successful project that was career defining. Orlando, just something that you, this vision that you had to get off the ground, it can drastically affect it. How well the vendor or the partner on the other side processes things.

Amy Forshee
[18:32 - 18:33]:

Absolutely.

Amber Collins
[18:34 - 18:53]:

That would be my, that would be. I think that's my greatest takeaway from that. And knowing, working directly with you here at Annex Cloud, I'll say that I think we have a great process. I think that we truly are invested in our customer success, and we've taken the time to think deeply about that. So how about you, Scott?

Scott Shurson
[18:54 - 19:16]:

One month. You know, we've talked about this with a number of our other guests. You know, the importance of alignment and you know what it can do for you. But I think Amy is the first one to really, like, quantify that and say that by not doing that, you have wasted a month and it's about half the project. Exactly. So if you, let's say you did it for half the projects internally as.

Amber Collins
[19:16 - 19:25]:

An organization, those are, those are numbers that affect the, the people above you. Those are numbers that affect the people below. Those are the numbers that have conversations that you don't want to have.

Scott Shurson
[19:25 - 19:26]:

So, Amy?

Amber Collins
[19:26 - 19:26]:

Amy.

Scott Shurson
[19:26 - 19:27]:

Yeah.

Amy Forshee
[19:28 - 19:53]:

So my last prince of wisdom. I think communication is key, right. It is the foundation for building relationships and trust. It helps for conflict resolution. And if you have open and transparent communication, it's going to set the team up for success and it's going to make a positive project experience all around. And building relationships is what loyalty programs are all about.

Amber Collins
[19:54 - 20:24]:
Exactly]:

So that's why we're all here. Right. It's to build those relationships. So if you would like to get a solution built out for you by Scott and implemented by Amy's team. You need to go to annexcloud.com and book a demo request or grab one of our AE's off of LinkedIn. But this has been another episode of CX. Anonymous Amy, thank you so much for joining us today and we are almost to the end of our stakeholder season and we cannot wait to share what we have in store for the next season.

Amy Forshee
[20:24 - 20:25]:

My pleasure. Thank you.