

Project-Based Management System for Total Accountability

Introduction

Henry Gantt, the original developer of the Gantt chart, believed that “**businesses need to be run like projects.**” He designed his signature chart to show a worker’s record – “what a worker should do and did do” and the “daily balance of work over the project.

Total accountability means total visibility and control of the organizational activities and cost for business and governmental agencies, including the ability to ensure that all tasks have identified owners with the responsibility to deliver. Management then has the ability to track all work and view accurate status reports through to completion. Such **transparency and agility** is critical to governmental agencies that often must **exert control over projects and respond to crises.**



Three critical information handling processes in an integrated enterprise platform provide support for performance management and improved business results and can be deployed in **one virtual office solution.**

- A structured hierarchical information system which enables **Total Accountability (TA) and transparency of shared data** in support of the most effective decision making and performance improvement is crucial. A universal truth is that executives hate surprises -- unrecognized risks are not welcome, particularly if they result in delay of schedule, cost overruns or customer dissatisfaction. Concerns about such risks can result in micromanagement and over-reporting.
- **Email to Project (E2P) and document management** can make the volume and type of data required for such a reporting system manageable by capturing emails and accompanying documents into a document library in a structured, searchable fashion.
- **Knowledge capture** is the third piece of the integrated process improvement platform. This feature makes critical company documents, best of breed processes and plans readily available to all.

These three software features can improve the effectiveness of tracking and managing activities and resources, and **reduce the overhead** of manual data management, searching for information and reporting time.

Knowledge capture, long a challenge for business, is built into everyday activities.

Total Accountability

Total Accountability is the quality management method developed to address the challenge of managing work across an entire enterprise, down to the activity, project, agency or employee level.

Activity-Based Total Accountability (ABTA) includes identification and display of total costs, services provided or activities performed. Every task or activity (or project or program) has an owner and the subsequent responsibility.

Open access to the activities of the operation and **on demand methodology** allow a rapid response to changes in direction. In this context, *on demand* refers to immediate access to the critical processes and activities across the enterprise, enabling speedy interventions.

In public sector organizations, this information can be displayed in an ABTA table for agency decision makers and legislators, providing accurate, timely data.

What are the Drivers for change?

The review of necessary management information for large and complex systems is challenging and time-consuming, if not impossible, without well designed performance systems.

- Mandated requirements for **activity-based and performance-based reporting** on funding will rapidly become more common in many federal, state and local bodies.
- **Government and business executives** must implement a workable, affordable way of **controlling activities and funds** to meet these demands.
- **Budget pressures** dictate reducing the excessive costs incurred for data collection and analysis.
- The **compilation of static reports delays the information** that management needs to act. Overdue items may not be noticed until they reach red status.
- **Proactive risk management is difficult**, without the supporting systems.

The U. S. Government Accountability Office (GAO) Report Nov 6, 2013 report on review of the submissions by the Department of Defense on establishing a Defense Health Agency (DHA) found the following:

- *Of the 87 performance measures presented by the DOD, none met the full criteria for successful improvement metrics – a concise explanation, definition or targets. **Clear metrics are necessary to help agencies determine their progress against performance targets.***
- *DOD provided a list of major milestones, but did not include interim milestones for the majority of goals. “A key practice for agencies undergoing business transformations is to **develop a detailed implementation plan with milestones for all actions so that progress can be closely monitored.**”*
- *DOD provided only an estimate of staffing levels, as an updated baseline assessment had not been completed. “**Key management practices require agencies to be aware of the size, knowledge, skills, and abilities of their workforces to pursue their missions.**”*
- *Of the business cases presented, **baselines were not given for each discrete business line**, resulting in no valid basis for savings.*

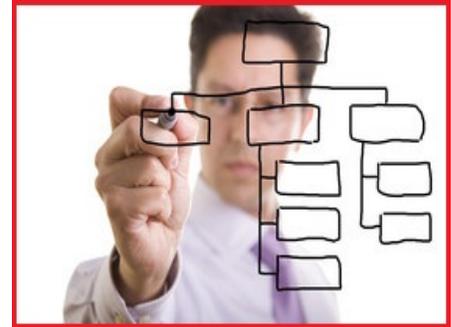
Conclusion: “Without more clear, complete, and transparent information on DOD’s plan for establishment of the DHA, it will be difficult for decision makers to gauge progress and identify areas of risk that will need to be monitored during implementation.”

Best Practices in Total Accountability Execution

A system mapped to the **organization chart** has the flexibility to adapt to all types and sizes of business structures. Beginning implementation, a company would determine the categories of breakdown, which could be by division, location, department, project or other existing business breakout. As an example, they might decide to map to four divisions – Human Resources, Information Support, Finance and Customer Support. Within that mapping, they would create teams and assign projects or activities to them.

Each activity or task can be assigned a Contract Line Number (CLIN), or bill rate. Standardized, best-of-breed task, activity and project templates can be pulled from the Knowledge Base to incorporate best practices and estimated costs. The system will then automatically capture every billable event against those tasks without additional steps.

New and improved processes can be mapped to this structure by the individual divisions or business units, making them **more relevant and user friendly**, and avoiding the delay and expense of coding by the IT department.



The tracking and reporting system **integrates with the Email to Project (E2P)** functionality to allow activities to be added, updated or reassigned automatically by email. The reassignment is immediately visible to the owner of the task and all others linked to it.

What are the advantages?

The interactive portal enables decentralization of management responsibilities while maintaining overview and control. Interactivity allows owners to act on the information they are viewing – **make assignments, change, add new tasks**

- **Access is immediate** through the report portal to background documents, emails, issues or work products under document management.
- Managers can track a document or activity through all its steps – including visibility of **delayed approvals or bottlenecks**.
- Visibility of the task or activity flow identifies best practices and the most efficient performers, enabling **benchmarking and creating a learning organization**.
- These functions are all accessible, but secure through the **single web portal** – from computers, tablets or phones.

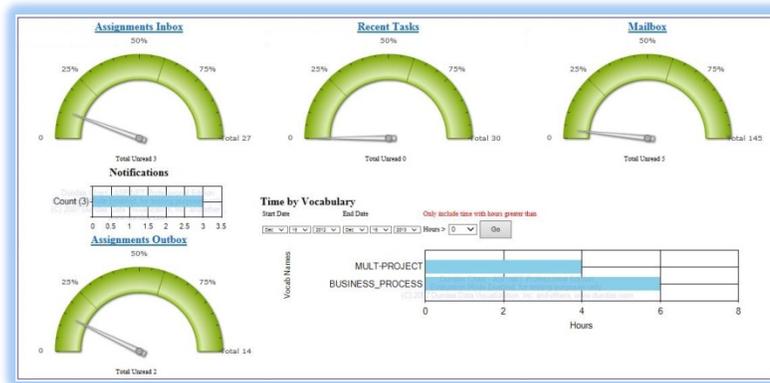
Summary reports across the agency are contained on one screen, with drill-down capabilities.

- **Standardized and custom reports** are available to the staff members as well as managers, to support transparency and ownership. Team members can track their workload and progress.
- **Real time status reports** are available on demand, for management or the client, without labor intensive paper status reporting.

- A **well-designed, automated system** provides **interactive, real time reporting** by project, by division or corporate-wide. **Reports can be filtered** to a specific task, activity, location, employee or team.

This type of system **creates a ‘no surprise’ workplace** with standard report formats. Active monitoring enables management to assess programs and projects in such a way that they can rapidly take **proactive action**.

- Views can be in **dashboard, Gantt chart** or **timeline** format in CYIPRO, and allow you to **drill down** or filter by employee or activity.



• **Figure 1 Standard C Level Dashboard**

- Familiar stoplight conventions, **Red-Amber-Green (RAG) reports as well as alerts** can be set up against milestones and deadlines.
- Reporting can be based on deliverables or the budget, **by hours or dollars**.
- Reporting views support **interactive filtering and reallocating** for different analyses.
- When Management takes a **corrective or steering action**, e.g., reprioritizing a project or implementing a change, the staff members’ dashboards reflect these decisions, keeping everyone on the same page.

When these systems are designed and used effectively, owners can use them to strengthen and improve the value of their programs, as well as improve competitiveness.

Email to Project (E2P) integration

In **legacy systems**, project managers and team members circulate information in email, hold meetings, make decisions, and then **manually place the information** into a project plan or a team room. They **report their time in a different system**. At regular intervals, everyone provides their updates to the status report. As much pertinent information as possible is squeezed into the report format, providing a **frozen in time one-dimensional snapshot** of the project. This effort is repeated up the ladder across teams, divisions, agencies and the entire enterprise, leaving executives uneasy about whether they really understand what is happening and **adding another layer of hours** to the project. **Everyone knows there must be a better way.**



Automate assignments and document sharing

Email to Project (E2P) takes **emails, transforms them into assignments**, and files them with the appropriate project so that all team members can read them, react, comment and respond. This capture is done without changing how you use email.

- **New projects and activities** can be estimated, staffed and scheduled quickly from templates stored in the Process Library.
- **Assignments and their due date are clear** to each staff member.

E2P **interfaces with your current email system to facilitate collaboration** with some built-in "intelligence" -- -- it knows who the email is from, finds all work from that person and then displays it chronologically, so you can select and hit ok.

The chaos of a cluttered mailbox is gone—no more storing emails locally where they can be lost, misplaced or deleted. An Email to Project system **integrated with reporting, resource tracking, document management and reporting** can capture all the data in the course of doing the work.

- Store all files and create a **default document library** or attach documents, emails, notes and timesheets to a project.
- Eliminate **'lost documents'** in email silos and file shares,
- **Collaborate** and share information across projects and teams.

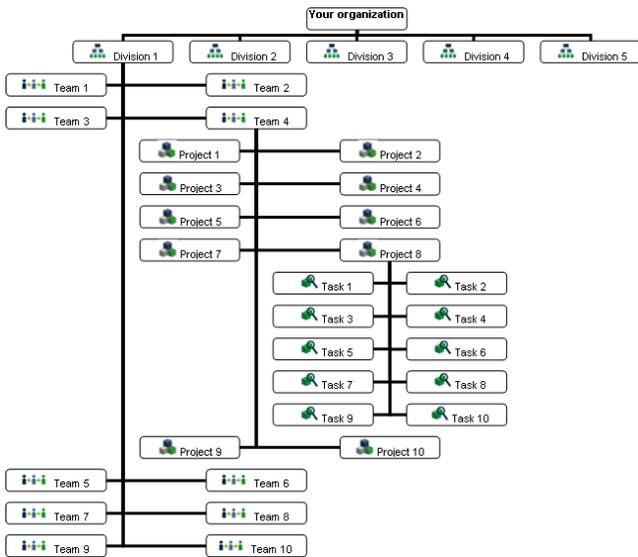
Management and staff can view and update projects securely through **computers, tablets or mobile phones**. Each mailbox controls what is shared through **customized privacy settings**.

- Set up **alerts and reminder notices** to team members when a task is due or send an immediate notification about a specific item.
- Use email to **enter time on a task**, mark it complete and create integrated time logs, approvals and billing.
- Budgets can be viewed and managed in real time in hours or dollars, **enabling tracking of billable and non-billable hours**.

The E2P component enables all resources to get work accomplished faster, with greater transparency, from beginning to end of the job.

Knowledge Capture

Knowledge centric organizations retain institutional knowledge harvested from staff that may be temporarily unavailable or later leave the company. **Knowledge Management** involves multiple aspects:



Knowledge Capture identifies critical business information and ensures it is made **explicit** (*documented*) and stored in a usable format;

- **Vocabulary**, keywords or categories, are defined against the organizational structure and assigned as metadata to facilitate searches.
- The **Library** can contain copies of processes, procedures, the employee manual, a proposal template, lease agreements, bill of sale, or project documentation, for example.
- Just about any digital file which your business needs is **immediately available** through menus or searches.

- Upload/Access **pictures, video or audio files or documents** from any mobile device or phone.
- **Full text searches** support rapid access.

Companies must also categorize and make **available tacit (experiential, unwritten, institutional) knowledge** which is difficult to capture in digital format.

- **Subject Matter Experts (SMEs)** can be mapped to one or more vocabulary terms.
- **Documents, services, processes and project templates** are linked to the SMEs by these vocabulary terms.
- The SMEs review work performed and set up templates for use the next time this required project is needed. They monitor feedback on the required service for improvements.

Knowledge Management ensures that this intellectual capital is indexed and made readily available in a secure fashion.

- Information is moved out of the **'dark corners' of the organization** – email inboxes, file shares and team rooms.
- Finding the right document, email, template or billing information is certain and fast.
- **Versioning** allows visibility to modifications and new processes.
- E2P allows **templates** to be retrieved, forwarded and attached to projects quickly.
- In reverse, files from the projects are moved to the **Document Library**.

Knowledge Utilization incorporated through an improved implementation structure integrates the stored templates, processes and contacts into everyday work activities, working toward a **paperless office**.

CYIPRO – Your Total Accountability Solution

CYIPRO offers three distinct advantages over a simple cloud computing solution. The platform, provides an **interactive command and control center**, enables local and remote teams to communicate and **collaborate** and create most effectively in one **project centric system**, and **captures the knowledge** in the system and makes it available.

- Build the effectiveness of your operations with a flexible, scalable platform designed by your business units and **modeled to the way your employees work**.
- Start building your **process library** by capturing and automating the most critical and commonly used workflows.
- Use CYIPRO's **exclusive Email to Project (E2P) tool** to take emails and attachments, and transform them into team discussions within a project.
- Use the **dashboard and alerts** and **powerful notification system** to assess programs and projects so that employees and managers can respond quickly and proactively.
- Track **Staff Requests** to completion in CYIPRO, giving total accountability to all involved.
- Make **quick and accurate decisions** with the information you need for the decision making process such as
 - The status of each project.
 - Who has done work?
 - How much time has been spent on a project?
 - How much time any individual has spent on a particular project or task?
 - What remains to be done and who needs to do it.
- Leverage your best assets by creating an **SME mapping** to skills, processes, projects and files. Find help fast.
- Get answers to your questions fast with the **Help** functions. **Product Help** supports your CYIPRO application. **Technical Support** tracks user problems, suggestions and errors/bugs.
- Use a **Web based portal** to gain the ability to collaborate with and manage your staff and activities via Smartphone or any Internet device with **encrypted access**.
- **Customize secure access rights** to view, edit, delete, and administer documents and components of the system.

CYIPRO offers total accountability among Government stakeholders and contract staff through its integrated project management, timesheet management, and automated reporting on staff utilization.

Innovation is ingrained in CYIOS' culture and our talented employees have built a legacy that continues today for our customers. **CYIOS** Corporation is a leading Department of Defense (DoD) contractor providing cutting-edge, innovative solutions since 1994. **CYIOS** built America's Army Online, the first Army Knowledge Management solution that was developed to become the core

for **Army Knowledge Online (AKO)**, the U.S. Army's main intranet serving over 1.8 million registered users.

CYIOS continued innovating in knowledge management with the development of **CYIPRO**, a virtual office solution for collaboration, accountability, knowledge management and virtual work spaces that features document management and versioning, project and task management, e-mail encryption, full-text search, timesheets, meetings, and reports.

Contact CYIPRO today to take your group to the cutting edge of innovation and productivity.

For more information on CYIPRO, go to <http://cyipro.com/>

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