

Insurance Company Enhances Communication

NORCAL Mutual Insurance achieves better project communication and capacity planning.

An Interview with Krista Gettle, Project Manager.



What were some of the top problems and / or issues you were facing when you first began looking for project management software?

When we initially sought project management software, we faced issues with coordinating resources and dates between our various departmental projects due largely to a lack of a centralized place to track projects. Most of our project plans were being tracked, if at all, in Excel spreadsheets and Word documents. By necessity, each of our department used a slightly different process to plan and manage their projects. However, some commonality was necessary in order to collaborate effectively on project work.

We purchased a tool prior to EnterPlicity that was fairly rigid in its scheduling and resource usage. The management of the tool proved to be too much overhead for the nature of our projects. Adoption of the tool was slow and eventually waned when managers could not accomplish basic tasks easily. Instead, we needed something that was flexible enough to accommodate different styles while providing a global view of organizational projects and resources.

What aspects of EnterPlicity addressed these problems and / or issues?

EnterPlicity addressed many of the challenges we had faced. It has a consistent and very usable interface that allows us to customize the tool to our needs both in terms of fields and functionality (e.g. it permits the project manager to schedule projects as detailed or high-level as they see fit). The tool is intuitive and easy to use through a tabbed interface and simple, logical functions. Therefore, once the project management framework was in place, the initial training on EnterPlicity was relatively short allowing users to begin using the tool quickly.

What was the approach that you took to implement EnterPlicity and project management in general?

After going through a needs analysis phase, a basic project management model that defined various project types accommodating varying levels of planning detail was adopted. All projects required a project sponsor and project manager with specified duties. Also common to all projects was the definition of milestones that reflected the major phases of the project and expected deadlines. These fundamentals laid a solid foundation for defining our approach to the software.

Each department participated in training and established guidelines for which projects would be included and how often they should be updated. This allowed corporate standards to be developed with input from each department.

What are the results that you have achieved through the implementation of EnterPlicity and project management in general?

Better communication and information about upcoming project deadlines and our capacity to accomplish them. The EnterPlicity implementation went very smoothly compared to our previous implementation. We were fully implemented with 100+ users within 3 months.

About EnterPlicity

EnterPlicity is a project information software system that combines project management tools, SharePoint-like information sharing, process automation, & reporting into a single, easy to implement package for mid-market companies to work better. You can learn more by visiting our website at <http://www.teaminteractions.com>.

