

# Turning on a Dime: Using Agile Techniques in Traditional Projects<sup>1, 2</sup>

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## Abstract

When the go live date is 100% inflexible, how do you achieve success when faced with seemingly insurmountable barriers? The program team for Choctaw Nation of Oklahoma (CNO) had to overcome incredible odds to bring cloud-based Human Capital Management (HCM) and Enterprise Resource Management (ERP) systems live on dates mandated by the Executive Steering Committee (ESC). This case study will explore how CNO used agile techniques in traditional projects to manage benefits delivery, critical issues, and keep the timeline on track.

CNO is a United States tribal government that supports its programs with multiple commercial enterprises in addition to grant funding. At the start of the Hoshonti program, the Nation employed more than 10,000 employees, and had an annual budget of almost \$2 billion. The program was critical to optimize CNO's entire hire to retire lifecycle, core accounting, and core purchasing processes for expected exponential growth.

The budget for the program was USD \$12.9 Million for professional services from 4 separate vendors. The go live dates were staggered for HCM/Payroll and ERP/Purchasing, as the two primary projects in the program. There were multiple smaller projects created for ancillary systems to support the new systems. All were structured in a traditional, waterfall approach to manage implementation.

The program successfully met the go live expectations with zero scope reduction even with the challenges brought on by Covid 19, and agile techniques made all the difference.

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## **Learning Objectives**

At the end of the presentation, participants will be able to identify agile techniques that can be used in traditional projects to manage benefits delivery, critical issues and other barriers to an inflexible timeline.

## **Turning on a Dime: Using Agile Techniques in Traditional Projects**

The Choctaw Nation of Oklahoma (CNO) is a United States tribal government that supports its programs with multiple commercial enterprises in addition to grant funding. CNO's Vision is "Living out the Chahta spirit of faith, family and culture." Its mission is "To the Choctaw proud, ours is the sovereign nation offering opportunities for growth and prosperity." The Hoshonti program contributes to all 3 strategic drivers of "Commitment to Our People," "Financial Stewardship" and "Operational Excellence." At the start of the Hoshonti program, the Nation employed more than 10,000 employees, and had an annual budget of almost \$2 billion.

The human resources and financial system being used by CNO at that time was Oracle's JDEdwards suite. This was implemented as an on-premise system that had been highly customized to support the incredibly diverse business interests of the Nation, and that customization resulted in unnecessary complexity, poor usability, and loss of vendor supportability due to inability to apply software updates. Additionally, the complexity prevented CNO from optimizing basic employment and financial processes across the organization. CNO's exponential growth rate was expected to continue and necessitated a reduction in complexity and improved training and documentation to support long-term sustainability. Therefore, CNO made a strategic decision to invest in the implementation of a cloud-based Human Capital Management (HCM) and Enterprise Resource Planning (ERP) system as a platform to enable transformational change across the shared services' functions at CNO, and I was hired to manage the Hoshonti program.

Hoshonti is the Choctaw word for cloud and was selected as the program's name to represent the cloud-based nature of the software systems being implemented. The Hoshonti program's primary objective was to implement the Oracle Cloud HCM and ERP systems to optimize CNO's entire hire to retire lifecycle, core accounting, and core purchasing processes.

The capital budget for the program was USD \$12.9 Million for professional services from 4 separate vendors. The go live dates were staggered for HCM/Payroll (1/1/20) and ERP/Purchasing (10/1/20). I established these as the two primary projects, with multiple smaller projects created for ancillary systems to support the new systems. For example, the time clock system (Kronos) had to be reconfigured to support the new Payroll system, so that was a subproject under HCM.

Other subprojects included employee data conversion, ADP tax reporting, and a new chart of accounts (COA). Due to the interrelationships between the data and processes within the scope of the new systems, it was critical to manage this as a program.

We hired Oracle Consulting Services as our Implementation Partner, and the work was thereby structured against the Oracle Unified Methodology (figure 1). Therefore, our program structure was fairly traditional with clear phases and stage gates.

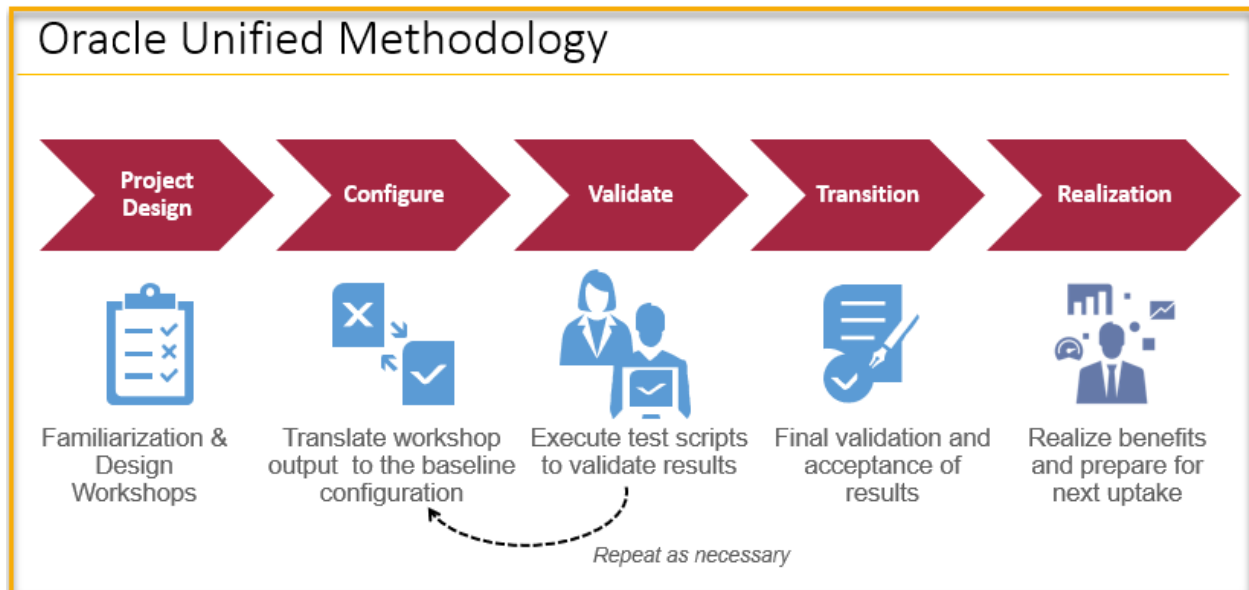


Figure 1: Oracle Unified Methodology

With respect to the triple constraint model of time, cost and scope, time was our number one constraint. The project had been started and stopped several times before we built the PMO, and our mission was clear: deliver on time at all costs.

Two dates were uppermost in our minds at all times: 1/1/20 for HCM delivery and 10/1/20 for ERP delivery (see Figure 2.)

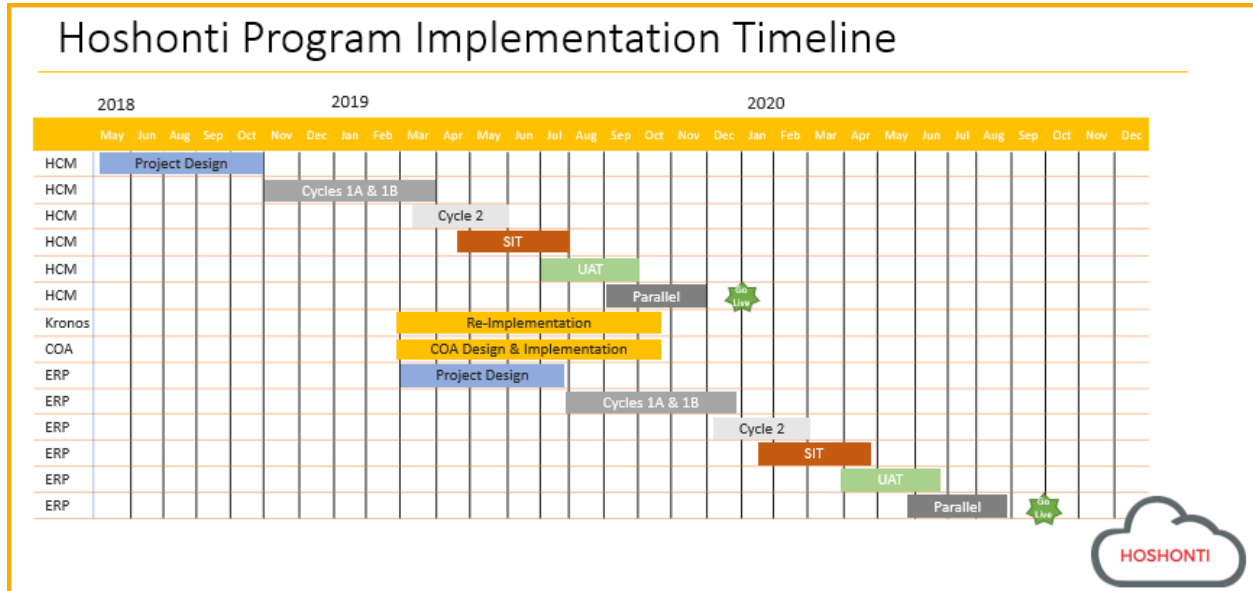


Figure 2: Hoshonti Program Timeline

Despite the traditional structure of the program, we identified specific Agile techniques to aid us in managing benefits delivery, critical issues and other barriers to an inflexible timeline. According to the Agile Manifesto (Beck et al., 2001), Agile values include:

- “Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan”

I think that last one, “responding to change,” best represents our approach, which was heavily focused on flexibility. We committed to our ePMO team that if something wasn’t working, we’d change it. We also made a conscious choice to focus on our “knowns” and take the “unknowns” as they became issues to be resolved or opportunities to be capitalized upon. On the agile end of Project Management Institute’s (2021) continuum of project lifecycle, “risk and cost are controlled as requirements and constraints emerge.” (See Figure 3.)

Predictive	Iterative	Incremental	Agile
Requirements are defined up-front before development begins	Requirements can be elaborated at periodic intervals during delivery	Requirements are elaborated frequently during delivery	
Deliver plans for the eventual deliverable. Then deliver only a single final product at end of project timeline	Delivery can be divided into subsets of the overall product	Delivery occurs frequently with customer-valued subsets of the overall product	
Change is constrained as much as possible	Change is incorporated at periodic intervals	Change is incorporated in real-time during delivery	
Key stakeholders are involved at specific milestones	Key stakeholders are regularly involved	Key stakeholders are continuously involved	
Risk and cost are controlled by detailed planning of mostly knowable considerations	Risk and cost are controlled by progressively elaborating the plans with new information	Risk and cost are controlled as requirements and constraints emerge	

Figure 3: Continuum of Project Life Cycles (Project Management Institute, 2021)

Another area in which we fell on the agile end of this continuum is stakeholder involvement. Our subject matter experts within the organization were 100% allocated to their projects, meaning they were relieved of their daily responsibilities for the duration of the project. They were therefore able to focus on continual elaboration of requirements until we went into testing. Even during testing, as we identified unmet requirements, we allowed for a certain degree of change where we recognized that change was critical to project success. This demonstrates one of the key agile principles (Beck et al., 2001): “Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.” Note that unmet requirements that could wait until after go live were placed on a roadmap for future delivery.

Several of these principles were also used in the design of the project and its supporting teams. These include (Beck et al., 2001):

- “...Business people and developers must work together daily throughout the project.
- Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.
- The most efficient and effective method of conveying information to and within a development team is face-to-face conversation...
- The best architectures, requirements, and designs emerge from self-organizing teams...”

We built an ePMO consisting of project managers, business analysts, process analysts and change management analysts (See Figure 4). We also utilized internal Information Technology (IT) staff and functional/technical consultants from several implementation partner companies. The project teams included these professionals as well as representatives from within the ranks of each functional area (HR, Finance, etc.). These motivated teams were grouped by functional focus and worked together daily, in person until impacted by Covid-19 shut downs. During the shut downs, we continued to work together daily in small groups organized by functional module. We conducted 100% of UAT for the ERP project fully remote, and were still able to make our timeline.

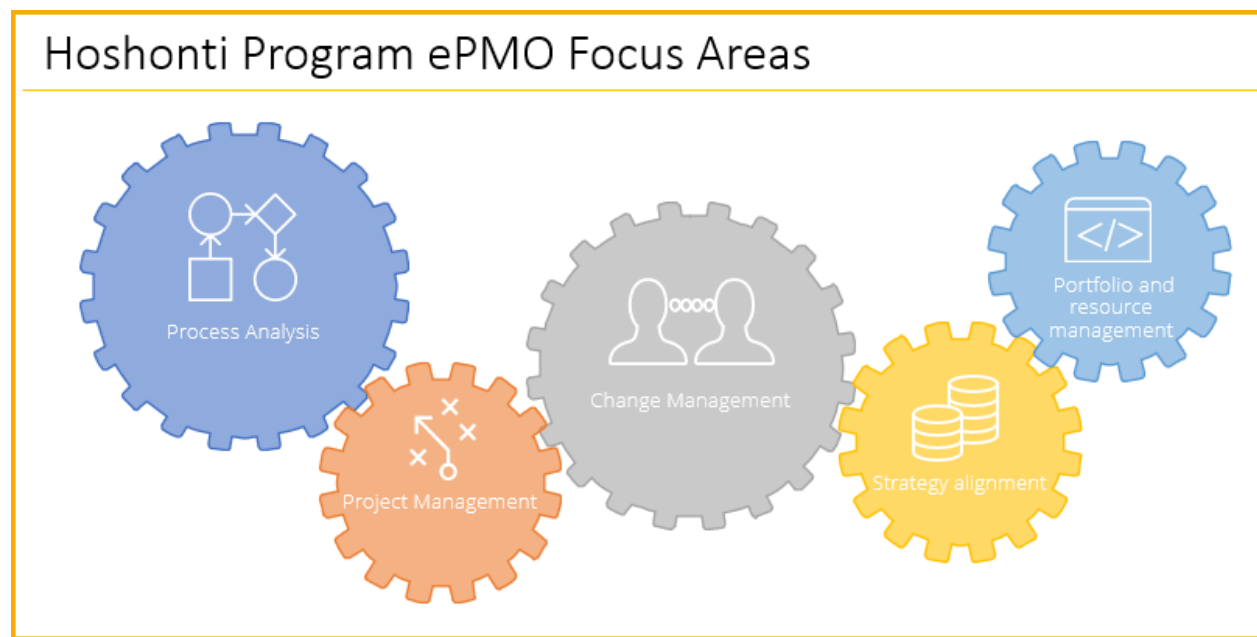


Figure 4: ePMO Structure

We used prioritization to meet the principle of “Simplicity--the art of maximizing the amount of work not done--is essential.” (Beck et al., 2001) We defined critical success factors as follows:

- Simple User Interface
- Continuous Access to Employee Self-Service
- Streamlined or Automated Processes
- Integrated Benefits Portal
- Seamless Mid-Cycle Employee Transactions
- Learning Management Integration

As part of our overall benefit delivery strategy, these are the items we were most focused on.

We also prioritized each of the modules within the system with respect to how critical they were (see figure 5), and allocated resources accordingly. The lowest priority modules received just enough attention to go live with out of the box functionality.

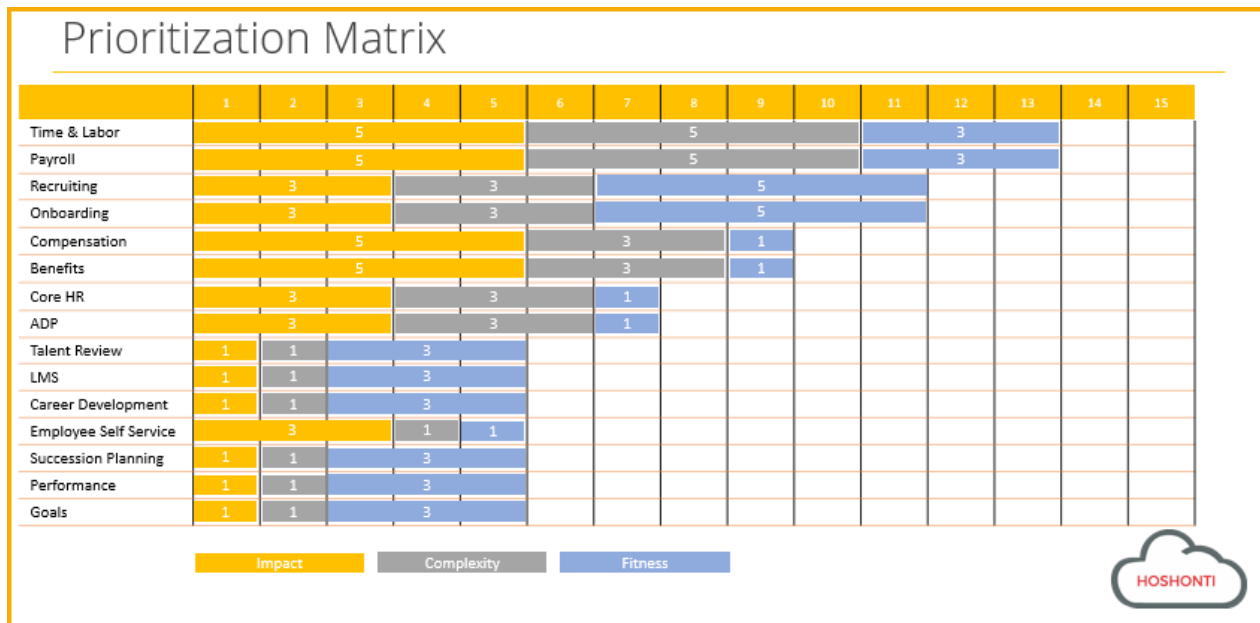


Figure 5: Module Prioritization

Also as part of benefit delivery, we had a very strict change control system that preserved scope unless a requested feature added significant value without compromising any of the critical success factors. For example, at one point during the ERP project, the project staff realized that the design of the chart of accounts would not support project objectives. However, to redesign would require assistance from our implementation vendor to the tune of \$1 Million. I presented the executive steering committee with an objective analysis of options, benefits and costs, and they decided to accept the increased cost to redesign the chart of accounts.

No area was more agile than our approach to issue management. Issues were compared to our prioritization matrix, and the degree of attention each received was based on the issue’s potential to reduce critical benefit delivery. As we got closer to each go live, we began identifying issues as “showstoppers,” which was defined as an “issue that impacts the ability to record hours worked, accurately process paychecks or realize other critical project success factors.”

We created a continuum of showstopper risk (see Figure 6) that helped us identify which showstopper issues had the highest probability and the highest impact if realized. We reported monthly to the steering committee the most critical issues, so by the time we requested a go/no

go decision, they were very well informed on the potential impacts and could make a fully informed decision. It is important to note that our use of the task management tool Wrike was critical to our fulfilling our issue management strategy. It enabled us to create dynamic dashboards to drive our escalation processes. It was a challenge getting the organization comfortable with some degree of risk, as well as accepting the delayed resolution of non-critical issues after system go live. However, this approach out of all our strategies was most impactful to meeting our mandated timeline.

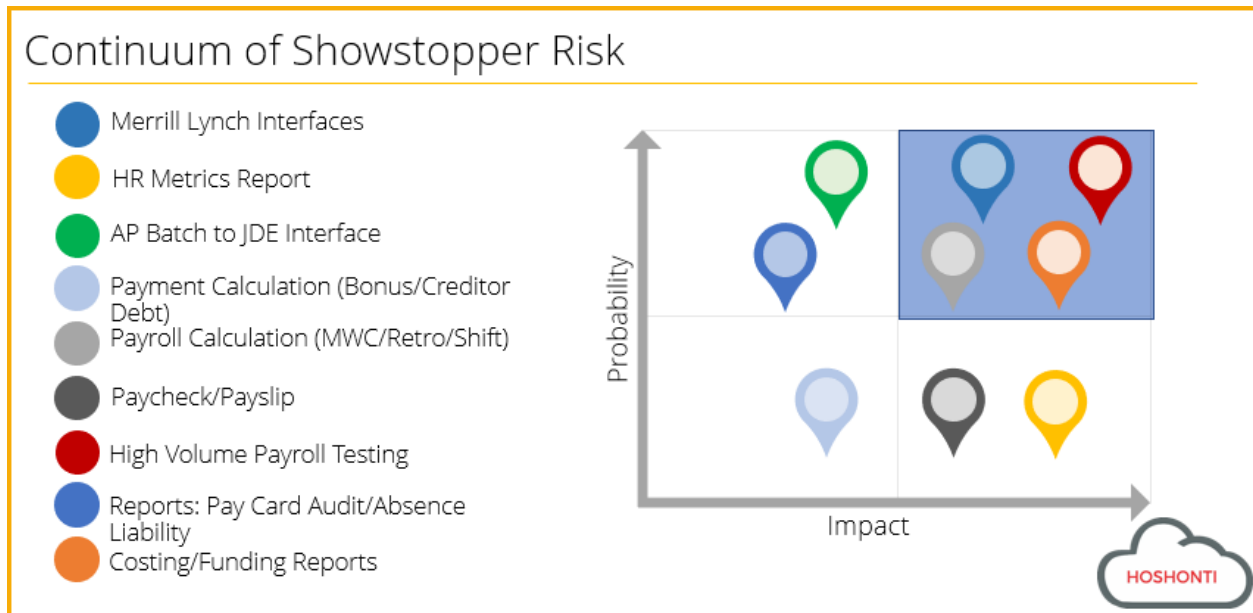


Figure 6: Continuum of Showstopper Risk

While our cutover plans consisted of thousands of separate line items, we identified a critical path that was limited to a handful of items, which allowed us to truly isolate dependencies and manage them most effectively. We held a twice daily scrum meeting during cutover that enabled us to both identify and address issues almost immediately where appropriate.

Finally, we’ve incorporated a number of these techniques in our guiding principles (see Figure 7) for ongoing support efforts for the program. Most notably,

- We will focus on progress over perfection,
- We will continually see ways to reduce complexity and increase transparency, and
- We are most effective when focused on our most critical risks and issues.



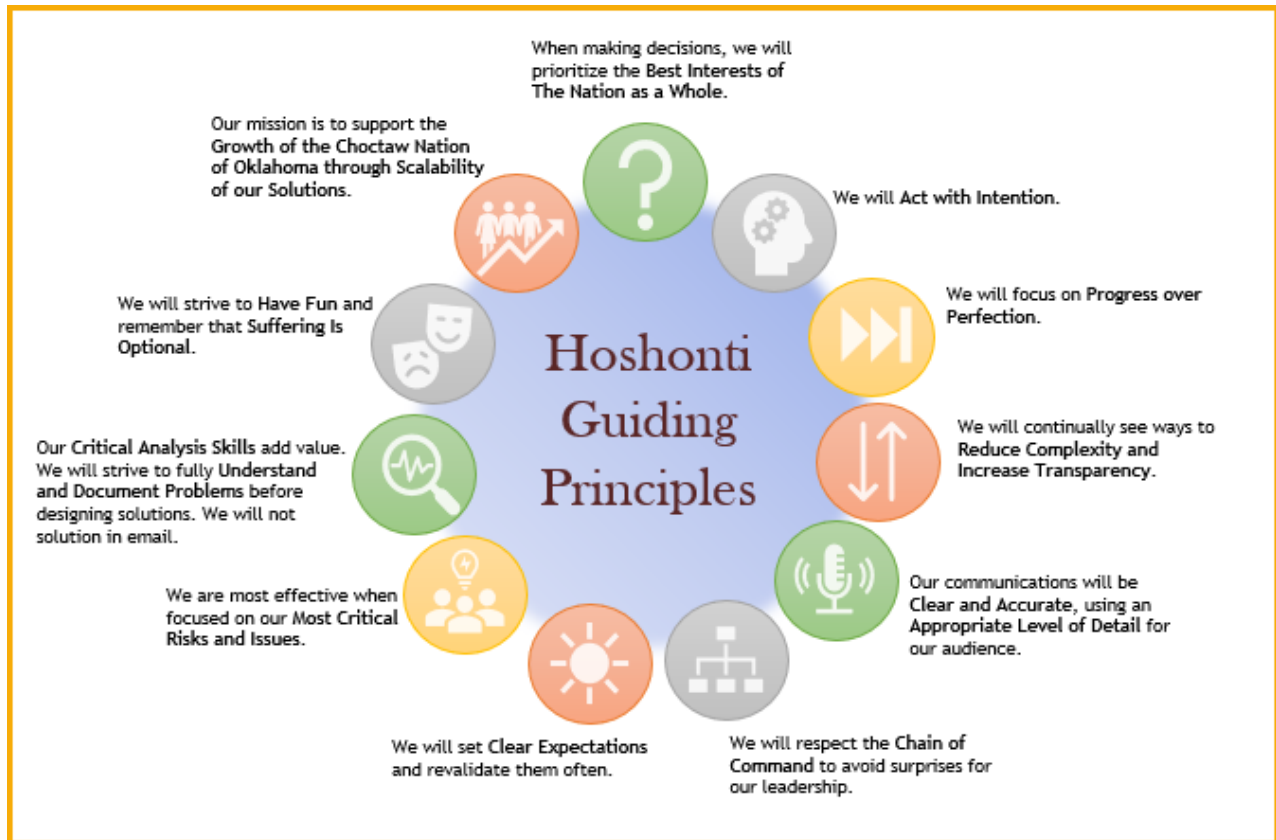


Figure 7: Hoshonti Guiding Principles

Therefore, through aggressive scope and priority management, we were able to establish a roadmap for non-critical changes. Using a web-based dynamic task management tool allowed us to visually demonstrate to our entire team where to focus efforts, and twice daily scrum meetings during cutover enabled us to quickly identify and address issues. In summary, adopting an agile approach to benefits delivery, critical issue management and timeline management enabled us to deliver a program that met all critical success factors, and most importantly, met the inflexible timeline expectations of the executive steering committee.

## References

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## About the Author



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