

Successfully Managing Complex CI Projects

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Case Study ~ Wolters Kluwer “Battle Cards”

- **Project description**

- Impetus from directors of marketing and sales. Multiple stakeholders; multiple objectives (6 competitors & 10+ intel questions each). Multiple methodologies. Required consensus to customize template. Used prior research; needed updating.
- **Key challenges:** Hidden agenda & “blind spots” sore point. Incomplete internal strategic direction. Competitor acquired at beginning of project. One internal product redesigned/launched after project. Many stakeholders
- **Outcome of the project :** On time/budget. Achieved consensus for strategic messaging. Integrated into sales onboarding. Kudos from solutions team. Unexpected large reuse by other staff (52+ downloads & counting)

Case Study ~ Wolters Kluwer “Battle Cards”

- **What went well**

- Using an expert consultant provided additional resources and expertise, assured excellence
- Regular communication & listening identified issues and helped achieve solutions in context of project
- Successful launch meeting, positive response to dissemination in comp intel newsletter

- **What might have gone better or would do next time**

- Not all needed staff were involved at start; ‘read-in’ at end of project
- Getting team members to review and edit strategies was difficult even with deadlines and hand-holding
- Never start something similar unless team has strategies in place!

Checklist: Best Practices & Challenges

- **Defining the CI Project**
- **Communication & Managing Sponsors & Stakeholders**
- **Methodology/Research**
- **Resources**
- **Managing Dissemination**
- **Managing Value: Project Review & Metrics**
- **Supplemental Resources**

Breakout and Record – 20 minutes

- Small groups by table
- **Groups use template in handout:** Select note taker and reporter to share @ end
- **Go around table:** Each person take 1 minute to share an experience with a complex project. Select one project for table to use
- **Table: Discuss and record selected project on handout:**
 1. Case description
 2. What went well about the project?
 3. What key challenges you overcame or what may not have gone as well as hoped?
 4. How you overcame the challenge or what might you do in the future to address?
 5. Any challenges to share with group?

Let's Share: What went well? What were the challenges? How did you overcome them? Any best practices?

CHALLENGES

BEST PRACTICES