Diego Curtiz at Highland State University

Watching the mid-winter snow fall outside his office window, Diego Curtiz could not stop thinking about what his boss Lisa Tainer had just told him: "You have *got* to get Ken on board. If he continues to challenge the team at every turn, he could blow-up the SSA project." A high priority initiative for one of the U.S's largest public universities, the SSA project involved implementing a new campus-wide student advising system. The change included not only introducing a new technology but also new processes for delivering and managing student advising. Campus administrative and academic leaders expected the SSA system to reduce costs, increase tuition revenue, and improve student retention.

Curtiz had been the SSA project leader since its early planning stage began eighteen months earlier. Until now, he had many reasons to believe things had been progressing smoothly and that the necessary technical and behavioral changes would be implemented on schedule. He felt bewildered by what Tainer told him. Certainly, she could not expect him *to force* someone to accept the project plan. What was he supposed to do?

IT Projects at Highland State University

Curtiz was one of seven project managers in the Office of Information Technology's project office (PO) led by Associate Director Lisa Tainer (Exhibit 1). Their role at Highland State University (HSU) was to plan, coordinate, and control the process for building new IT services. Curtiz joined the group as a project analyst four years earlier after spending two years as a software developer in the private sector and then earning an MBA at HSU. Over time, Tainer gave him additional responsibilities that included overseeing smaller projects and supervising a PO assistant and two part-time student employees. He had recently earned project management certification, a highly valued credential and a prerequisite at HSU to lead larger projects. As a result, in April 2012 Curtiz received a promotion to project manager, a role referred to at HSU as the "project lead." His duties now included negotiating task assignments, facilitating team work, and communicating with project stakeholders. Project leads managed up to six projects concurrently.

Tainer reported to Chad Simon, the director of the Enterprise Systems Group that had responsibility for all campus-wide administrative systems including PeopleSoft (for human resources management) and COGNOS (for financial reporting). Associate Director Stefan Flahive ran the Systems Engineering (SE) group with its twelve analysts and developers and reported to Simon. Each IT project paired a technical lead from Flahive's group with a project lead from Tainer's. While the project lead was accountable for keeping a project on time and within budget and scope, he or she depended on the technical lead for expertise and guidance on what needed to be done and the amount of resources required. Project leads typically had no formal authority over team members and relied instead on building trustful relationships.

Implementing the SSA System

The first of five projects assigned to Curtiz was "SSA", a new system to support student advising. Its capabilities included scheduling advising sessions, predicting when a student may be at risk for failing a course, and monitoring student progress toward a degree. SSA was to replace a hodge-podge of separate and much more limited tools used by each of HSU's eight schools and colleges. Almost all of HSU's peers among large state universities were using SSA to improve retention rates through early intervention to those needing academic or other assistance. A first-year student at HSU who failed to return for her sophomore year represented an average total loss of more than $60,000 in tuition and fees. Each

percentage decrease in the dropout rate would net an estimated $3,000,000 annually. The university also expected that moving to a centralized advising system would achieve cost savings by eliminating redundancies and creating efficiencies.

Curtiz had coordinated the year-long work of a planning committee comprised of faculty, student advising staff and senior academic administrators including associate and assistant deans. Committee members represented various stakeholders with different priorities and concerns given how they expected to use the new system to support their respective roles in the advising process. The SSA project's technical lead was Megan Jacobs, who with nearly three decades' experience at HSU was SE's most senior system analyst. She attended the SSA committee meetings to observe and provide expertise as needed. Ken Cullen, communication and training manager, also attended the meetings. His role included providing updates and other information to faculty, staff, and students about the new advising system. In addition to e-mail, web posts and social media messages, Cullen met frequently with individuals and groups throughout the campus.

After lengthy and often heated discussions, the committee agreed on what the system should be able to do, how it would be used, and the implementation approach. The provost set a budget for the project accordingly and advised that no additional funds would be available. When asked for feedback on the planning process, committee member opinions were split; slightly more than half regarded it as one of the best group experiences of their careers, while the others found it far too contentious. Several comments specifically praised Jacob's contributions as constructive, respectful, objective, and jargon-free.

The committee established an aggressive timeline for the project and expected the system to be in operation by the start of the 2014-15 academic year. With less than eighteen months to implement the system, Tainer asked Curtiz to apply leading-edge project management practices for rapid technology development and deployment. These included the use of cross-functional development teams, short-cycle iterations of work that incorporate customer feedback and daily in-person status update meetings, which were conducted standing up to keep them brief. Many of these techniques were new to HSU and required project team members to work in new ways both individually and as a group. Tainer and Flahive each led one two-hour meeting of their respective staff members to discuss the new approach.

These adjustments notwithstanding, by the halfway point of the schedule the project had achieved every milestone and was on track to meet the deadline. With just under eight months to go, almost all of the technical pieces were in place. Importing the massive databases of student and course information remained, and the project team was working closely with the registrar's office to complete the associated tasks. The other significant deliverables yet to be finished included documentation on how to use the system and learning materials for workshops set to begin in mid-June. Cullen and his communication and training team had responsibility for this portion of the project. Although according to the project plan that work should already have been underway, Cullen insisted on waiting until Jacobs's group completed its tasks before starting to create any documentation or other materials.

The Project Team at Work

The SSA project launch went smoothly after Curtiz had developed the full project plan, assembled the team, and assigned tasks. All team members had attended training provided by SSA's vendor at the start of the project and were fully knowledgeable about its functionality and use. At regular project review meetings both Tainer and Flahive expressed support for how the project was proceeding and

often noted Curtiz's careful attention to detail, timely communication, and decisiveness. Simon seemed pleased with the monthly briefings on SSA that Tainer and Flahive provided and left project-related decisions to them. At the end of one such update, though, he inquired whether they knew of any tension among project team members. He had recently received an anonymous note that said, in part:

> *I don't know what you've been told about the SSA project, but someone needs to rein in Ken Simon. He won't stop sticking his fingers into everything we do. He is supposed to inform the campus about the project status, but instead he's always questioning our decisions on everything. Last week, all of the sudden he starts ranting about how there should be fewer features and options and the user interface should be simpler. These decisions have already been made!! He thinks he's so charming, but half the time he doesn't know what he's talking about.*

Tainer responded that Curtiz had mentioned disagreements at team meetings that seemed to make some attendees uncomfortable. She trusted his ability to work out any conflict and was not concerned given that to date the project was on time and on budget. Flahive said he thought Jacobs uncharacteristically had returned from some SSA meetings agitated, but had not spoken to her about it.

Immediately following that conversation, Tainer called Curtiz into her office to find out what was going on. He acknowledged some tension between Jacobs and Cullen, which he attributed to sincere differences about what was best for the project. Cullen also had challenged other members of the team occasionally and had even questioned Curtiz's decisions, once in front of the entire team. Cullen usually said he was just passing along suggestions and concerns he had heard from prospective SSA users. Still, Curtiz was taken aback to learn about the note Simon had received:

> *It had to be Megan. I don't understand why someone would go behind my back and skip two levels to complain to the Director, let alone do so anonymously. No one is out of control; I think conflict and disagreements are normal and can lead to better decisions. If you're looking for something that needs attention, Stefan is the one always trying to micro-manage the project. One day it's 'Do it this way, the deans want it.' The next it's 'No, Megan tells me it can't be done, so forget about it.' Maybe you should talk to him.*

Tainer knew Flahive typically provided his staff with much more direction than she gave to hers, but Simon seemed to favor Flahive and Flahive's staff loved working for him. She said she would consider speaking to her peer, but for now thought it would be better for Curtiz to deal with Cullen: "You have *got* to get Ken on board. If he continues to challenge the team at every turn, he could blow-up the SSA project."

Curtiz walked back to his office and started to question his view of how the project was going. He rarely lacked confidence, but now felt uncertain about his abilities. Had he misinterpreted Cullen's behavior? Had he offended Jacobs somehow, perhaps by not giving her views enough weight? Was he misjudging how well the project was going? He slumped in his chair and watched the snow fall as he pondered his next steps.

Exhibit 1: Partial Highland State University Organization Chart