

A large orange semi-circle graphic on the left side of the page, with three horizontal lines (orange, cyan, and lime green) extending from its left edge. A vertical lime green line extends downwards from the bottom of the semi-circle.

Case Study  
**Metropolitan**

## Focusing on people and processes to drive successful change management at Metropolitan.

Metropolitan is a leading provider of integrated housing services, care and support and community regeneration. Managing over 38,000 affordable homes for rent and sale to those with greatest need, along with a range of care and support services, Metropolitan have over 2,300 staff who provide assistance to 80,000 customers across London, the East of England and the East Midlands.

The organisation is currently facing a period of unprecedented change. Taken together, the Coalition Government's programme of economic and welfare reform, the recasting of the settlement for funding and regulation of social housing, and the localism agenda represent the most significant challenge to both service providers and their customers seen in a generation.

## The Issue

A number of years ago Metropolitan had recognised that certain aspects of their project planning and delivery needed to be improved to enable them to meet the forthcoming challenges and ensure greater return on investment. Controlled project management was something that the organisation felt it hadn't always previously carried out effectively. Metropolitan's Senior Managers recognised the benefits of having a specialist Programme Office to work with colleagues across the organisation to improve project delivery and to ensure time, effort, budget and resources were being used effectively.



## The Solution

In 2009 the Business Programme Office (BPO) was set up. The team is made up of professional project management, project support and governance staff.

Metropolitan understand that the people element of any project is vital to its success. A Change Management function was also established to develop staff engagement at all levels in project delivery.

The BPO recognised the need for a robust project delivery tool to ensure projects were implemented effectively. Working with Corporate Project Solutions' (CPS) consultants an initial roll out plan was created focusing on process, training, support, soft skills and the Microsoft EPM toolset implementation consisting of Microsoft Project Server; Project Professional and Project Web Access.

The objective was to implement a simple, user-friendly project management system, based around Project plans, to drive a consistent approach within the BPO before being rolled out to all Metropolitan staff involved in project delivery.

Alison Churton, Portfolio and Resource Manager at Metropolitan explains:

*"We are in the housing and care support business not the project management business- therefore we are gradually doing away with elaborate project management speak and complex documentation. Our approach is based on PRINCE2 but it must be simple and plain English to ensure everyone in the organisation can use it. For us the soft skills are one of the most important elements of any project. If stakeholders are engaged with a project it is more likely to be successful"*

CPS had the experience of the tools as well as significant project delivery knowledge and was therefore able to assist the BPO

in reviewing all existing processes, assisting with the creation of the project management templates, developing streamlined resource allocation and management processes.

An initial roadmap was produced to define a four-phased approach to implementing improved processes and Microsoft EPM functionality in parallel. Defining and creating progressively maturing processes and toolset use whilst broadening the user base in a planned and consistent approach.

The project lifecycle has been reworked and now defines all of the project management products that should be delivered within each lifecycle phase. Each product has had the appropriate document template or list produced within Microsoft EPM. A suite of project management processes has been created describing how each of the products will be delivered by role.

To ensure the team has everything they need a set, of multi-functional, templates has also been developed. The same information is available to all audiences i.e the project team have the same view of risks as the Executive to ensure transparency and accountability across Metropolitan.

The Microsoft EPM system is now being used for every project but there's more work to do. Metropolitan have found the system easy to use and recognise it as a solution that they can grow into and configure as they continue to develop their own 'Metropolitan' project management approach. Early in the installation it was realised that a step change approach was required to roll out the tool.

Along with awareness raising sessions, to ensure user adoption, each of the processes was discussed within workshops and simple role based flowcharts were produced. An Internal Project Manager to drive the change through and ensure it remained focused on the end users, not just on the new technology.

Alison comments:

*"We knew that a solely IT focussed approach would not work for us. We have had to engage and gain buy in from all members of the team as it was these people that would make the change. We knew that to be successful we had to win hearts and minds of everyone."*

Training and support for all stakeholders is a vital element of embedding the changes to the project management system ensuring that everyone understands the technology and how it will benefit them and their projects. Enforcement was also an on-going priority to ensure the behavioural changes remained in place and the system continued to function effectively.

Looking back on the initial roll out, Alison explains how it hasn't been all smooth running:

*"The biggest negative of the implementation has been the time and resource commitment required to push through the changes when we were already so busy delivering projects. If we'd been able to 'down tools' for a month or so just to get it all sorted that would have been great - naturally that wasn't possible. At the end of the day, the day job of delivering projects across Metropolitan is our first priority. This change has to be done in the background which has meant progress is often slow"*

## The Benefits

There is now increased consistency and greater data visibility across Metropolitan's Portfolio of 40 change projects. Using the Microsoft EPM toolset as a central document storage area, the alignment of processes and increased transparency has improved the quality of project delivery by our project managers and support teams.

## The Future

Improving Metropolitan's planning capability is also in progress and will include the integration of CPS' Project Auditor tool to help the team with health checking their project environment. Use of Microsoft EPM is also being developed to strengthen the Portfolio, Programme and Project governance, auditing and reporting needs.

After the successful implementation within the BPO, the Microsoft EPM system will be rolled out to everyone involved in delivering the Portfolio within Metropolitan.

## Change Management Lessons Learned

The development and roll out of the EPM solution is continuing but Alison reflects on the change management process:

*"Training, communications and user engagement are some of the biggest issues we face when delivering projects. We were unable to really move forward and develop our new project management system until the senior managers in the team became actively engaged, often preferring old habits like using Excel spreadsheets or not taking the time to understand how to use a new template. In our experience you must focus on stakeholder buy-in, communication, training and enforcement to ensure you realise your objectives."*

## About CPS

As an established full-service consultancy, CPS are an accredited and trusted provider of future-proof technology solutions, expert Portfolio, Programme and Project Management consultancy, professional recruitment and outstanding customer support.

Find out more at [CPS.co.uk](http://CPS.co.uk).





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