Providian trust

(1) What key issues and challenges led to the initiation of the Access Plus project? Please think about the external vs. internal and business vs. technological aspects of the issues and challenges.

From an internal point of view, Providian Trust board members felt that the trust's information system was outdated and therefore the day-to-day activities, which could be done more efficiently with a new software and process, were taking long periods of time and lots of resources. Per example, generating a financial report for a client would take the effort of several trust operators from the front office and back office which is an excess of human resource, and would take about 3 months to generate it.

Clients felt they didn't have to wait so much for a report. These kind of complain were making Providian Trust look bad against their competitors, who took considerably less time doing the same activities. Technological speaking, the Access Plus project has a big challenge. According to the information provided, the trust officers are very old dated when it comes to PC usage, some of them don't even use one.

One of the biggest division of Providian Trust (Pension & Institutional Trust Services) had the largest amount of full time employees (FTE) yet they were losingmoney, that's why another important issue that led to the initiation of this project was the amount of money that was wasted by wrong handling of processes. Since trust officers usually gave late or inaccurate statements, the company was giving around 2 to 5 million $ a year in compensating wages.

(2) What organizational changes that the company should have made (but failed to do) before and during the project to ensure the success of the Access Plus project?

This project was basically a change initiative project. To have an effective change implementation, a careful evaluation of the problem needs to be made to begin with. I believethe team leader, Michael LeBlanc, understood the problem well but failed to properly select the change initiative team and also failed to create a sense of urgency among the organization regarding why the change was needed. To have an effective change team, champions and helpers from every step of the organization need to be chosen.

Per example, by completely ignoring the 240 IT personnel (even when IT was an essential part of the project, if not the most essential), the change team was missing important members and that made it lack credibility. The employees and trust officers were not convinced from the beginning about why the change was needed, therefore they didn't believe in it and they didn't even put in the effort. They also should have done a better selection of the program, focusing more in the company's needs then in the competitor's status.

(3) What were the strengths and weaknesses of Providian's approach in managing the project?

As far as strengths go, I would only think that having the funds ready to make the project is one of them and also having a leader convinced that the change is needed. When it comes down to weaknesses we have lack ofcommunicationbetween change teams. Also, the employees are not

convinced about the change and most of them were resisting it until the end. Another weakness is the lack of computer knowledge from the staff and trust officers and also how behind the IT staff was regarding the installation of computers. And lastly, informing employees that some of them will be let go off after the change, createdstressin the job and made it harder for the initiative to be effective.

(4) How would you evaluate the role (good or bad) that the internal auditor Peter Storey played throughout the project? Do you agree with him, why and why not? (if you were in his role what would you have done differently?)Should he be fired, why and why not?

I believe Peter Storey played a good role. His job was to audit the system and give an unbiased opinion. It was his opinion that the proper controls were not in place to implement the change and I also share that view. In his report he states 13 identified risks that were not communicated to Walsh by LeBlanc. I would have sent this report to the CEO as well. I don't think he should have been fired since he was informing his point of view and seemed very valid. I believe the CEO made this decision without the proper information, and he also wanted the implementation to happen so he chose to follow the external audit.

(5) If you were in charge of the project, what would you do differently? What have been your experience and observations of IS projects in your organization? If you were in charge of a healthcare IS implementation project in your organization, what would be the top three things-issues on your agenda list?

I would've created a bigger sense of urgency regarding the need for change. It's a critical aspect for a change initiative to be successful, otherwise people don't believe in it and its doom to fail, or work inappropriately. I would have chosen a more qualified steering committee (seeing as they didn't feel accountable for what they were doing).

I have never been part of a IS project, however I think my top three things would be: A. Properly training staff training in IT basic. B. Selection of a well varied change team and a good planned objective, easy to share with the staff. C. Open communication channels between the organizational line, from back staff to change champion. When these kind of changes are being implemented, most of the times the lower level has a better view of the issues that occur than the higher level.