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HCM LESSONS LEARNED

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CLOSED SESSION

This is a closed session. You must be a labs employee to attend.
No vendors or contractors are permitted.

AGENDA

“The past can hurt.
But the way I see it,
you can either run
from it, or learn
from it.”

- Rafiki

The Lion King

- 1) Introduction
- 2) Goal for Today
- 3) Background
- 4) Project Challenges
- 5) Project “Pause”
- 6) Lessons Learned Process and Approach
- 7) Key Themes
- 8) Key Takeaways
- 9) Questions

INTRODUCTION



Laura Charles
Senior Manager, IT



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Project Manager, IT



Meredith Haney
Solutions Architect, IT



Shaïna Saint-Lôt
Procurement, IT

GOAL FOR TODAY

Our goal today is to share our HCM lessons learned with you so that you can learn from our journey and take away valuable insights for your implementations.



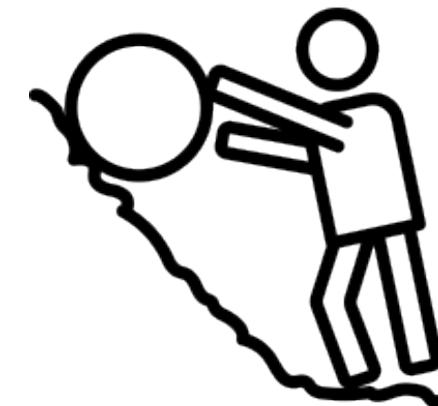
BACKGROUND



PROJECT CHALLENGES

1. Leadership changes at all levels and across domains
2. Misalignment on shared vision, scope, and schedule
3. Project management methodology: fit and lack of buy-in
4. Too many cooks in the kitchen
5. Systemic competing priorities
6. COVID

+ more....



PROJECT "PAUSE"

After several evaluations from independent parties and lack of resolution on issues preventing success, the project was "paused" and lessons learned activities began.

LESSONS LEARNED PROCESS AND APPROACH



Key themes emerged from multiple looks at our project:

- 1) Lack of clarity on scope, requirements, and priorities
- 2) Challenges with project structure
- 3) Issues with culture and communications
- 4) Team health
- 5) Ineffective project management methods and training
- 6) Procurement approach



KEY THEMES: SCOPE AND PRIORITIES

Issue	Causes	Lesson Learned
Unclear scope, requirements, and prioritization	Scope not solidly defined, agreed upon, and managed	<p>To better define scope and align requirements, the project must have the following:</p> <ul style="list-style-type: none">• Leadership priority & commitment to:<ul style="list-style-type: none">• Align on overall project vision• Making timely decisions aligned with project goals• Resolve obstacles and problems to enable success• Established method and criteria for prioritization• Defined process for managing changes to priorities and customizations• Definition of what success looks like from executive and other levels of leadership• Assessment of the full impact of decisions• Clearly defined minimum viable product (MVP)• Understanding of delivered functionality vs. customizations (including integrations)• Well-written and traceable requirements• Streamlined business processes that align with delivered functionality



KEY THEMES: PROJECT STRUCTURE

Issue	Causes	Lesson Learned
Challenges with project structure	<ul style="list-style-type: none">• Continuous leadership changes• Lack of clarity on roles & responsibilities• Lack of an empowered functional product owner• Lack of communication• Lack of commitment to governance processes	<p>To create alignment, cohesive teaming, and a robust project structure, the project must have the following:</p> <ul style="list-style-type: none">• Buy-in and support from new leaders as they onboard• Clearly defined and communicated roles/responsibilities across domains• Agreement on and commitment to process for making decisions in alignment with:<ul style="list-style-type: none">• Product vision & roadmap• Defined scope/cost/schedule• Governing principles



KEY THEMES: CULTURE AND COMMUNICATION

Issue	Causes	Lesson Learned
Issues with culture & communication	<p>Lack of buy-in and established/enforced team norms, expectations, and communication</p> <p>Inadequate communication from leadership to the team</p>	<p>To build better culture and communication, the project must have the following:</p> <ul style="list-style-type: none">• A definitive, achievable vision and scope• A way to address conflicts/issues directly and promptly to ensure team has a clear path to success• Providing a culture and vision that allows team member buy-in• Leaders modeling the way by following through with commitments and being receptive to feedback• Documented team agreements and expectations• Recognition and appreciation for the contributions of staff• Consistent/effective feedback loop• Consider keeping an independent third-party product manager• Well-developed communication plan & change management plan



KEY THEMES: TEAM HEALTH

Issue	Causes	Lesson Learned
Team challenges	<ul style="list-style-type: none">• Lack of adequately allocated, aligned, and integrated working teams• Trust issues rooted in misaligned vision and goals for the project	<p>To build better working teams, the project must have the following:</p> <ul style="list-style-type: none">• Adequately resourced project• Proper team allocations (# of team members and % availability to project)• Integrated representation (IT, HR, Finance, etc.) to promote collaboration and reduce resource dependencies• Team agreement to support an integrated executive, HR, and IT team• Communication of shared vision from upper leadership• Focus on team building and healthy conflict resolution• Safe environment to work through risks and concerns



KEY THEMES: PROJECT MANAGEMENT METHODOLOGY & TRAINING

Issue	Causes	Lesson Learned
Project management methodology & training	Lack of experience, training, and understanding of the project management methodology and the absence of a clear and consistent direction to execute against	<p>To build a project management methodology that meets the needs of the team, the project must have/consider the following:</p> <ul style="list-style-type: none">• Agreement and alignment on the approach• Adequately trained staff• Leverage Subcontractor expertise to drive the approach• Organizational Change Management (OCM) from project inception

PROCUREMENT HISTORY & BACKGROUND INFO

Subcontract #1

- ❖ **SOW:** IT implementation HCM cloud
- ❖ **Status:** Descoped
- ❖ **Pricing Type:** Time & Materials (T&M)
- ❖ **Award Type:** Best-value competition

Subcontract #2

- ❖ **SOW:** HCM Cloud business process transformation
- ❖ **Status:** Descoped
- ❖ **Pricing Type:** T&M
- ❖ **Award Type:** Sole-source

Other Subcontracts

- ❖ **SOW:** Miscellaneous IT services to support HCM cloud implementation
- ❖ **Status:** Descoped
- ❖ **Pricing Type:** T&M
- ❖ **Award Type:** Various

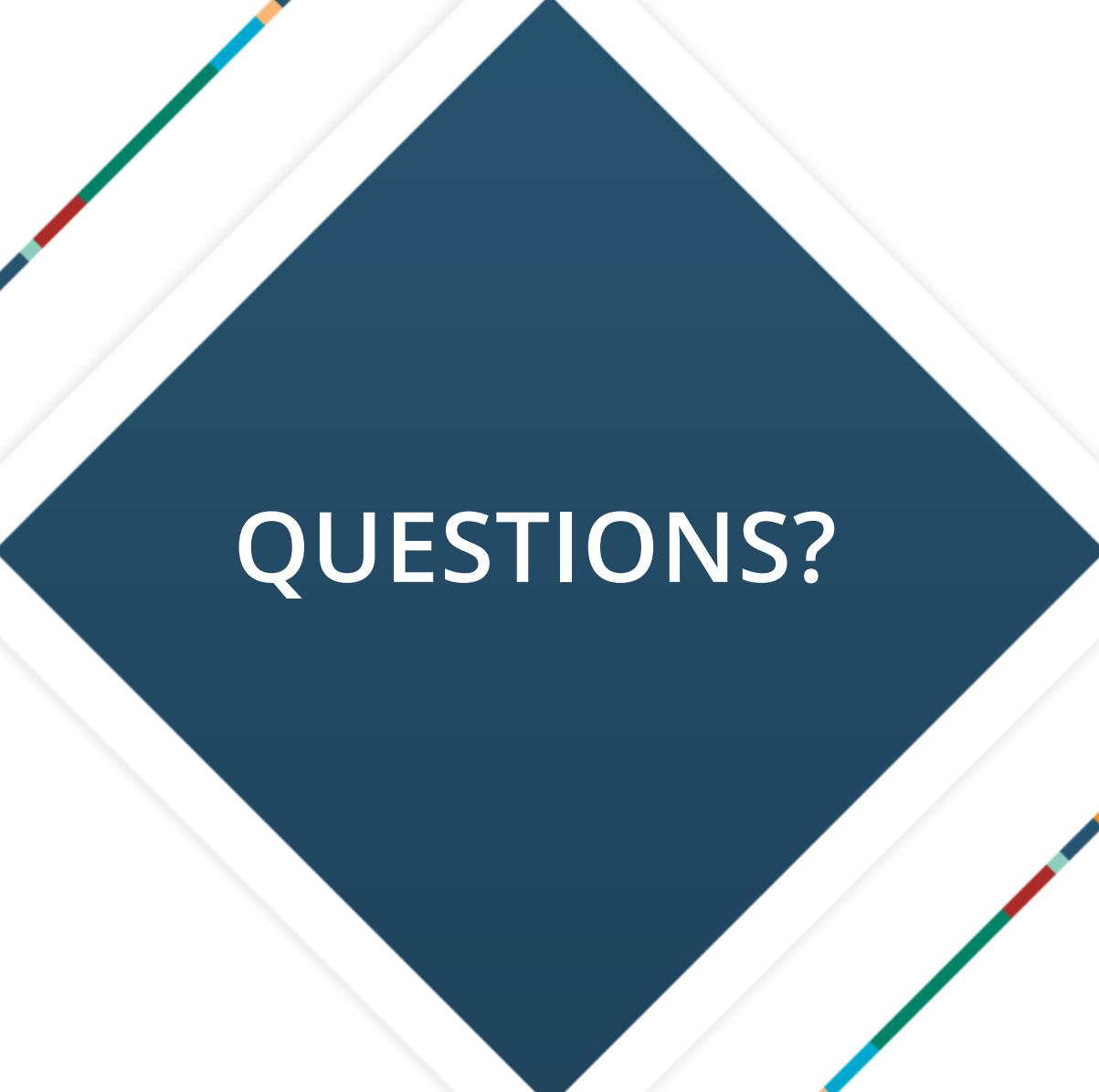
KEY THEMES: PROCUREMENT APPROACH

Issue	Causes	Lesson Learned
Lack of accountability	<ul style="list-style-type: none"> • T&M Subcontract pricing type • Too many subcontracts for one project • Undefined roles and responsibilities 	<ul style="list-style-type: none"> • Utilize Firm Fixed Price (FFP) pricing type • Issue implementation of IT, OCM, business processes, etc. under one subcontract • Document RACI matrix for RFQ • Define governing principles in SOW
Unclear requirements	<ul style="list-style-type: none"> • Undefined SOW with general direction and lots of unclear terms like "help" and "assist" • Lack of detailed information at RFQ 	<ul style="list-style-type: none"> • Create specific SOW language • Include company background info • Provide draft technical and functional requirements • Provide historical data conversion scope & known interface requirements • Include a dedicated SOW section for OCM
Too many cooks in the kitchen	<ul style="list-style-type: none"> • Misalignment on project goals led to separate subcontracts for technical implementation and business processes 	<ul style="list-style-type: none"> • Issue one subcontract for all project work with Build phase as an option • Write a holistic SOW that aligns with the strategic goals of the project

KEY TAKEAWAYS

- The top things that must be addressed:
 - Alignment on product vision and scope
 - Executive accountability for success of the project
 - Building the right team
 - Clear roles and responsibilities
 - Selecting the right project management methodology and obtaining buy-in
 - Organizational Change Management (OCM)
 - Clear, detailed SOW and RFQ for one subcontract
- We have identified many actions to improve and have already implemented some - but there is still work to do.





QUESTIONS?

THANK YOU!