MANAGING COMPETING PRIORTIES

WISCONSIN ENTERPRISE MANAGEMENT DEVELOPMENT ACADEMY
CLASS OF 2016

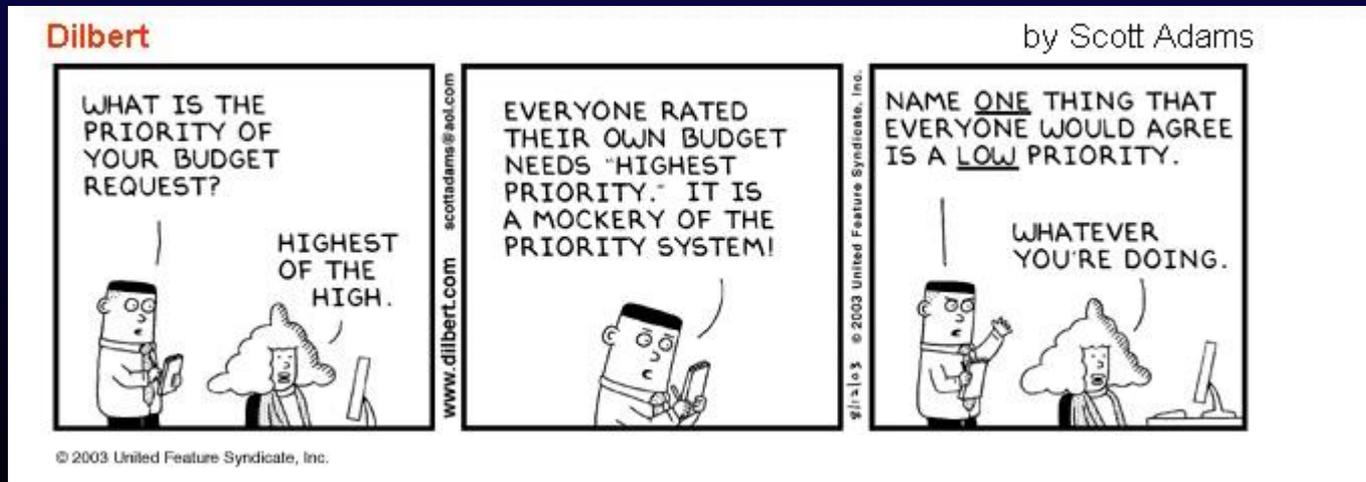**TEAM 3**

Sue Granger - DOA
Katie Herrem - DOC
Mark Hoenecke - ECB
Anastasia Thomas - DOR
Matt Umhoefer - DOT

OVERVIEW

- **Introduction (Mark Hoenecke)**

- **Scope and Context (Katie Herrem)**

- **Tools and Resources (Matt Umhoefer)**

- **Two Case Studies**
  - **DOA (Sue Granger)**
  - **DOR (Anastasia Thomas)**

- **Summary (Mark Hoenecke)**

INTRODUCTION

- **Why Prioritize?**
  - **Limited resources (inter-related)**
    - **Time**
    - **Money**
    - **Human Resources**
  - **Multiple tasks**
  - **External influences**

Dilbert by Scott Adams

Panel 1: WHAT IS THE PRIORITY OF YOUR BUDGET REQUEST? / HIGHEST OF THE HIGH.

Panel 2: EVERYONE RATED THEIR OWN BUDGET NEEDS "HIGHEST PRIORITY." IT IS A MOCKERY OF THE PRIORITY SYSTEM!

Panel 3: NAME ONE THING THAT EVERYONE WOULD AGREE IS A LOW PRIORITY. / WHATEVER YOU'RE DOING.

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INTRODUCTION

- **Linear prioritization**
    - **Works for computers (speed)**
    - **Doesn't work so well for people**
- **Newer tools for categorizing priorities**
    - **"Eisenhower Matrix"**

https://researchadministrationnation.com

http://growthcheatsheet.com

INTRODUCTION

- **Additional methods and programs for priority categorization**

- **Case Studies from two different types of state agencies**

SCOPE AND CONTEXT

A manager who effectively prioritizes understands:

- **<u>SCOPE</u>: what activities must be prioritized; and**
- **<u>CONTEXT</u>: the environment in which he/she is prioritizing.**

What priorities am I managing, and what influences how I manage them?

SCOPE AND CONTEXT

2016
State of Wisconsin
Enterprise
Management
Development
Academy

What is the SCOPE of my prioritization exercise?

Key questions:
- What are the activities I am prioritizing?
- What tasks are currently competing for time/resources?
- What is the deadline for each task?
- What is the importance of each task?
- Who is requiring each task?
- What control do I have over the timeline for each task?
- What must I do myself and what can I delegate?

SCOPE AND CONTEXT

What is the CONTEXT of my prioritization exercise?

Key questions:
- **What resources are currently available?**
  - *Time/Human Resources*
  - *Money*
- **What external factors must I consider?**
  - *Laws and Policies*
  - *Stakeholders*
  - *Authority figures*
 - *Differing expectations*

TOOLS AND RESOURCES

- **Countless number of software programs**
  - **Includes software designed specifically to aid in prioritization, as well as customized versions of Microsoft Excel**
- **Useful characteristics include**
  - **Project and multi-project incorporation**
  - **Ease of comparing importance and resources required**
  - **User-friendly visualization and reporting mechanisms**
  - **Portability across platforms**
- **Check with your department on licensing**

TOOLS AND RESOURCES

- **Analysis of Competing Priorities (ACP)**
  - **Risk management methodology that can be used to either avoid the greatest negative repercussions *or* attain the greatest positive benefit**
  - **Assumes all options are feasible**
  - **Easy way to "weigh" options without resorting to software**

ACP Examples

2016
State of Wisconsin
Enterprise
Management
Development
Academy

**+ means something will occur;
- means something will not occur**
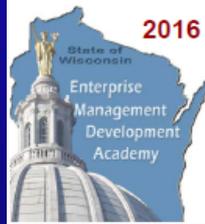
	Complete a regularly recurring report a day early	Miss work to go donate blood without letting anyone know	Spend all day on State St
Manager gets upset	-	+	+
Senior Leader gets upset	-	-	+
Fired from my organization	-	-	+
Bad news on front page of WSJ	-	-	+
TOTAL +	0	1	4

	Complete a regularly recurring report a day early	Develop a significant positive opportunity for the organization	Organize a team effort to volunteer in the community
Pat on the back	+	+	+
Employee of the month	-	+	-
Promotion	-	++	-
Good news on front page of WSJ	-	-	+
TOTAL +	1	4	2

ACP Information Technology Example - Positive Benefit

	Purchase upgraded email servers	Purchase advanced analytical software licenses for one year to complete a project	Hire three additional IT personnel
Contributes to strategic outcomes	-	+	-
Improves staff-workload balance	-	-	+
Does not incur new long-term costs	+	+	-
Causes no/minimal disruption to the workforce	-	+	+
TOTAL +	1	3	2

+ means something will occur; - means something will not occur

CASE STUDY – Administration Division of Enterprise Technology

- **Provide Enterprise IT for 35 agencies**

- **Mission**
  - **To be the IT service provider of choice**
  - **To exceed customer expectations and allow State agencies to focus on their core business.**

  Scope ranges from strategic direction to the day-to-day operations

CASE STUDY – Administration Division of Enterprise Technology

- **Enterprise IT changes potentially impact all**
  - **Review**
  - **Schedule**
  - **Communicate**

OK, THERE IS A SMALL CHANGE... RED BAG HAS THE SANDWICHES GREEN BAG IS YOUR PARACHUTE

- **IT Service Management**
  - **Set of practices focused on aligning IT services with the needs of business and managing change**

CASE STUDY – Administration Division of Enterprise Technology

- **Cherwell**
  - **Change management**
  - **Schedule and classify changes by type – based on level of risk**

- **Change coordination considerations**
  - **Conflicts**
  - **Agency business cycles**
  - **Change freezes**
  - **Potential risk to business continuity**

CASE STUDY – Administration Division of Enterprise Technology

- **Operations Communication – "OpCom"**
  - **Daily meetings – weekly changes**
  - **Monthly meetings for changes scheduled further out in the future**
  - **Stakeholders participate**
  - **Exceptions process**

- **DET OpCom Reports https://det-auth-prod.wi.gov/operations/Pages/Reports.aspx**
- **ITIL https://en.wikipedia.org/wiki/ITIL**

CASE STUDY – Revenue Income Sales and Excise Tax Division

- **Mission**
  - Promote voluntary tax compliance, identify and address noncompliance, provide excellent service, and promote fairness and equity in tax administration
- **Unclaimed Property**
  - Exceed customer expectations throughout the claim process and by proactively reuniting funds with owners
  - Manage securities portfolio
  - Work with businesses reporting property to ensure compliance

CASE STUDY - REVENUE

- **UCP Environment**
  - **UCP is self funded**
  - **Follow WI State Statute 177**
  - **Short staffed**
  - **Busy season**
  - **3 major IT projects in process**
    - **Each requires 20 hours/week from staff**

CASE STUDY - REVENUE

- **Issues**
  - **Limited staffing**
  - **Tight timelines**
    - **3 IT Projects with same deadline**
    - **90 day statute to process claims**
    - **Call answer rate ≥ 98%**
- **Resolutions**
  - **Projects broken into phases**
  - **LTE hired**
  - **Staffing resources lent from other areas**

CASE STUDY - REVENUE

- **Results**
  - **Working with stakeholders**
  - **Utilizing all offered resources**
  - **Unit is still operating efficiently**

SUMMARY

- **We manage our priorities**

    or

- **Our priorities manage us**

- **Please see the brochure for more on this topic**

- **THANK YOU!**