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# Project Management Systems Thinking Departmental Upgrade

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WESTERN MICHIGAN UNIVERSITY

# Student Affairs Marketing Communication

## Project management systems thinking departmental upgrade

Student Affairs  
Western Michigan University



WESTERN MICHIGAN UNIVERSITY

### ABSTRACT

**Student Affairs Marketing Communications** provides support services for several Western Michigan University departments. In addition to a strong online Web presence, printed materials continue to be a popular medium for Dining Services, Residence Life, Student Affairs and Children's Place Learning Center, a primary list of Student Affairs departments marketing does work for. Promotional materials are developed for both new students recruitment and retention of students. Throughout the year, the marketing department develops and designs a variety of projects in print, digital media and for the Web—in fact over 400 per year.

The marketing team consists of a marketing manager, webmaster, marketing specialist, senior and a part time graphic designer. To keep the department deliverables project objectives within time and resource commitments it is important to be organized and systematic in the approach. Project managing is an important function of that organization. After ten year's the system approach required review and updating.

### GOALS AND OBJECTIVES

Each year as part of the performance management program and departmental strategic planning there are goals for process improvements. Administratively providing a systemic process approach that is organized and accurate for daily tasks is helpful with the available technology. As a project manager it is important to provide quality and consistency to all projects.

- PROCESS IMPROVEMENT**
- Administrative process improvements
  - Automation of routine tasks for better accuracy and time savings
  - Performance management goal, continuous process improvement
  - Technology improvements with the web based tool
  - Monthly marketing staff meetings to discuss workflow

### DEPARTMENT NEEDS ASSESSMENT

Researching and planning for a project management systems technology upgrade to improve the process in general for both administrative and customers is a time consuming process, while concurrently managing the daily job responsibilities. There is a commitment to make continuous improvements—accuracy and time saving for routine tasks. Improve quality and customer satisfaction.

At the March 2015 marketing staff meeting a needs assessment review took place. The chart to the right shows the current workflow list.

#### Workflow

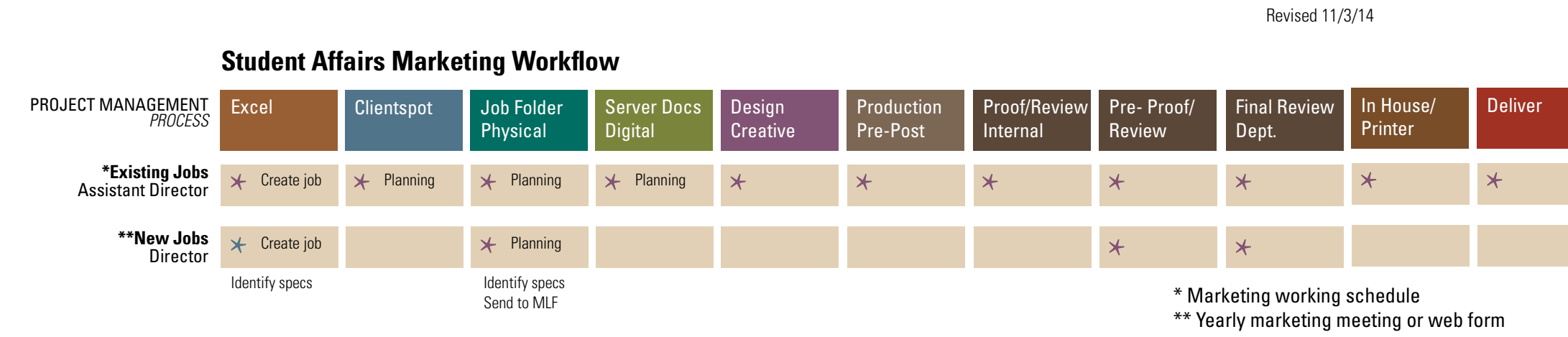
##### Excel department job tracking (Document tracking)

- Project specs: (status, month request, department, job number, designer, title, project type, description, size, quantity, date in, vendor, due date, date complete, cost, billed, delivery, time, RFP submitted)
- Marketing calendar (document identifies department projects by month)
- Manual RFP's (PDF document)
- Manual billing
- Web requests online form – no analytics

##### ClientSpot (current online system)

- Project description
- Project specs
- Unique job numbers
- Permissions
- Duplicate projects/archive,
- Time tracking/estimating
- Tasks
- Discussion/comments (sends an email)
- Upload documents for review
- Calendar view
- Due dates

### CURRENT PROCESS



The current project management process is identified in the graphic workflow as a multiple step, systematic approach. The Student Affairs departments meets with the marketing manager to review the yearly creative brief. Once these meetings occur, the project manager receives notes and an updated monthly project calendar. From this calendar many of the yearly, reoccurring projects can be scheduled and assigned. Based on system thinking, the improvement will come in with a more robust online, collaborative, trackable project management system.

### SEARCH RESULTS

After a detail search of project management online systems. The results have been narrowed to four online systems. The comparison chart to the right was compiled based on the department needs assessment. The review was broken down into categories; traffic/workflow, creative, accounting, cost system details for a more comprehensive view.

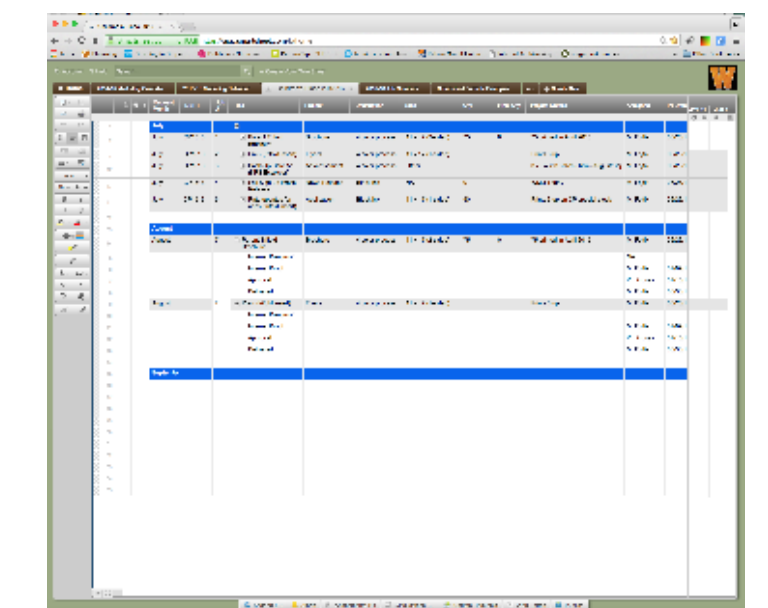
July 28, 2015  
Student Affairs Marketing Communications Project  
Management Review

Project Management System Review	Current	SmartSheet	By	Copper	Creativepro Office
<b>Workflow/Process</b>	X	Center Calendar	X	Group Calendar	Group Calendar
Visual calendar	X				
Color coded	X				
Client (DC, ML)	X	X	X	X	X
Project templates	X	X	X	X	X
Design review	X	X	X	X	X
Designer review	X	X	X	X	X
Proof sales	Table	X	Table	Table	Table
Job numbers	X	X	X	X	X
Job management	X	X	X	X	X
Discussion view (reads)	X	X	X	X	X
Task tracking	X	X	X	X	X
Task Allocation	X	X	X	X	X
Workflow management	App	App	App	App	App
Project links (external)	X	X	X	X	X
<b>Details</b>					
Custom form	X	X	X	X	X
RFP doc handling	X	X	X	X	X
Online printing	X	X	X	X	X
Library	X	X	X	X	X
File storage	1 TB	40-100	50GB	100GB	100GB
<b>Accounting</b>					
Reporting	CSV	CSV	CSV	CSV	CSV
Project Cost	X	X	X	X	X
Web form (RFP request)	X	X	X	X	X
Visual timeline - Gantt	Calendar	Calendar	Calendar	Calendar	Calendar
Time Allocation/estimate	X	X	X	X	X
Costs: Expense budget	X	X	X	X	X
Billing/invoicing	X	X	X	X	X
<b>Client/Service</b>					
Free project/ID	30 day	30 day	30 day	30 day	30 day
Contract	Partly	Partly	Partly	Partly	Partly
Users	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
Sign-up/activation	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>System</b>					
Price	\$400	\$100	\$20 per user & start up (\$200)	\$75 per month	\$4 per month
Hosted	X	X	X	X	X
Cloud data software	X	X	X	X	X
Google integration	X	X	X	X	X

### PRODUCT EVALUATION

Production Evaluation 2015  
Solutions (software)  
Research and internal review with marketing team

- Product evaluation  
RFP process  
Budget?  
Software—submit for review (OIT)?  
Requirements  
Vendor demo's  
Department buy-in  
Final decision



### DEVELOPMENT PROCESS

Development process  
Marketing team review for set up  
Transition to new software  
New process

Departments at some point will need to be included as part of the process in terms of buy-in for a new system chosen,

### CONTACT INFORMATION

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### PROJECT EXAMPLES

