

Global Management System White Paper

Making Collaboration Productive

Definition

A **global management system** provides the processes and tools required to ensure that organizations and people can complete all tasks required to achieve their goals.

Many management systems help people work together within organizations, but a **global management system** provides the processes and tools required for people to keep tasks synchronized within and between organizations.

Table of Contents

| | |
|---|----------|
| GLOBAL MANAGEMENT SYSTEM..... | 1 |
| Abstract..... | 1 |
| PART 1 – The Challenges that a Global Management System must address | 2 |
| Introduction..... | 2 |
| Traditional Management Approaches..... | 2 |
| Changed Operating Environment | 2 |
| Workplace Challenges | 2 |
| Challenge 1 – Scalability | 3 |
| Challenge 2 – Automatically sorting out Relevant Tasks..... | 3 |
| Challenge 3 – Automatically creating a ToDo list for each person. | 4 |
| Challenge 4 – Supporting Teams | 5 |
| Challenge 5 – Security and Privacy of Task & Team Information..... | 5 |
| Challenge 6 – Keeping work flowing when people are separated | 6 |
| Challenge 7 – Automating many Functions of Management | 6 |
| Challenge 8 – Feedback and Reporting | 6 |
| Challenge 9 – Templates & Contingency Plans | 6 |
| PART 2 – A Solution to the Nine Core Challenges | 7 |
| Introduction..... | 7 |
| Solution Overview | 7 |
| Key Benefits | 8 |
| Differentiators..... | 10 |
| Conclusion..... | 10 |

GLOBAL MANAGEMENT SYSTEM

Abstract

Working together to achieve goals sounds simple, but the reality is anything but simple. In the workplace, there are many challenges that need to be overcome for work to flow easily between the people doing the work.

Some innovators are exploring social networking (such as provided in MySpace and FaceBook) for managing work, but social networking lacks a coherent method for people to manage work together.

Traditional management systems focus on largely local situations where the manager can control, or at least influence, how people are using their time and effort. There is a strong reliance on managers personally implementing the functions of management: goal setting, organizing, leading, monitoring, communicating and coordinating. Personal involvement allows a manager to gain the knowledge required for effective problem solving and decision making.

The requirement to manage work beyond a local team has made implementing the functions of management significantly more difficult and time consuming. Consequently there is an urgent need for a management system that makes it easy for people to work together anywhere at any time.

Part 1 of this paper identifies nine core challenges that are stopping people reaching their potential to effectively work together. Many of these challenges are accepted almost universally as givens that cannot be changed. However after over ten years of workplace research and development, TASKey has evolved a comprehensive management system that addresses all of these challenges.

Part 2 of this paper describes TASKey's new global management system that gives all managers and team members' critical task and team information, not available using current methods. Clear accountability, real-time progress reporting, and timely feedback not only improve productivity, but reduce frustration by clearly showing each person's involvement in relevant tasks and exactly what they need to do.

TASKey's new global management system and web software tool to apply the system consistently provides a solution to the nine core challenges. The solution manages work through people and automates many of the complex and time consuming management tasks needed for high productivity.

PART 1 – The Challenges that a Global Management System must address

Introduction

Traditional Management Approaches

Traditional management systems focus on largely local situations where the manager can control, or at least influence, how people are using their time and effort. There is a strong reliance on managers personally implementing the functions of management: goal setting, planning, organizing, leading, monitoring, communicating and coordinating.

Management methods were developed to manage people doing work that was reasonably well defined. People were usually within the span of control of the manager and the manager was able to see what was happening. So the manager's problem solving and decision making were largely based on information they had personally gathered.

Traditional management systems require the manager to spend a lot of time and effort finding out what is happening, sorting out priorities, telling people what to do, and keeping work on track. This usually involves many meetings and requests for information that also take time away from team members doing the core work.

As tasks got more complex, new management methods were devised to manage special situations. For example, in the 1950's project management was devised to manage clearly defined tasks where a plan could be developed and the project manager could focus management efforts on exceptions (i.e. where the implementation was diverging from the plan). However where a plan could not be developed with reasonable accuracy, management by exceptions is difficult to apply.

Changed Operating Environment

With the changes associated with globalization, managers now need methods to manage teams that include people from outside their organization (who are not under their direct control). Traditional management methods have extreme difficulty coping with the new operating environment.

A positive change in the operating environment is the enhanced level of connectivity. In the past landline telephone calls, physical meetings and written reports were the norm. Now the addition of mobile phones, emails, instant messaging, VOIP, video conferencing, and chat rooms have streamlined connectivity between people. However this increased connectivity cannot overcome the limitations of current management approaches.

The biggest challenge is how to cut through the significant complexity that comes from increased numbers of tasks per person (doing more with less) with the requirement for contributions from people who are physically separated and working from different agendas.

Workplace Challenges

TASKey's research has identified nine core challenges that stop people achieving their individual and team potential.

Solving these challenges is required to handle the complexity of current workplaces and to provide a practical solution that can operate globally. Some innovators are exploring social networking (such as provided in MySpace and FaceBook) for managing work, but social networking lacks a coherent method for people to manage work together. The following challenges show why current social networking methods are insufficient for work networking.

The nine core challenges are:

- Challenge 1 – Scalability
- Challenge 2 – Automatically sorting out Relevant Tasks for each person
- Challenge 3 – Automatically creating a ToDo list for each person
- Challenge 4 – Supporting Teams
- Challenge 5 – Security and Privacy of Task & Team Information
- Challenge 6 – Keeping work flowing when people are separated
- Challenge 7 – Automating many Functions of Management
- Challenge 8 – Feedback and Reporting
- Challenge 9 – Templates & Contingency Plans

Challenge 1 – Scalability

A scalable management solution needs to be able to cater for individuals and small teams through any sized organization to people working together globally in many organizations.

The core of the solution needs to be a very simple module that links tasks and people together. Modules must be easy to join to create larger tasks (even when people are not collocated). The solution must quickly and flexibly handle from two local tasks to thousands of tasks spread globally without people losing control.

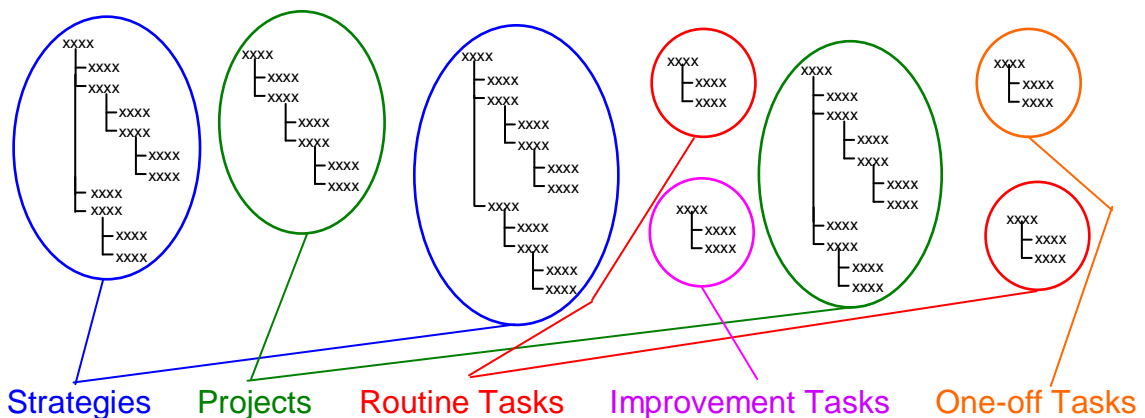
Technology needs to be used to help people manage the complexity that quickly arises when the number of tasks extends beyond a manager’s control. However a scalable solution needs to closely match how people work naturally and would like to work, so both training time and resistance to change is minimised.

Without a simple workable solution that seamlessly scales, it is impossible to dynamically link all levels of management (strategic, operational, tactical, team and individual) together in real-time.

Challenge 2 – Automatically sorting out Relevant Tasks

A major problem in the workplace is sorting out which tasks are relevant to each person. Without knowing what is important and what is not important, a person is overwhelmed with tasks and is unsure of where they need to contribute.

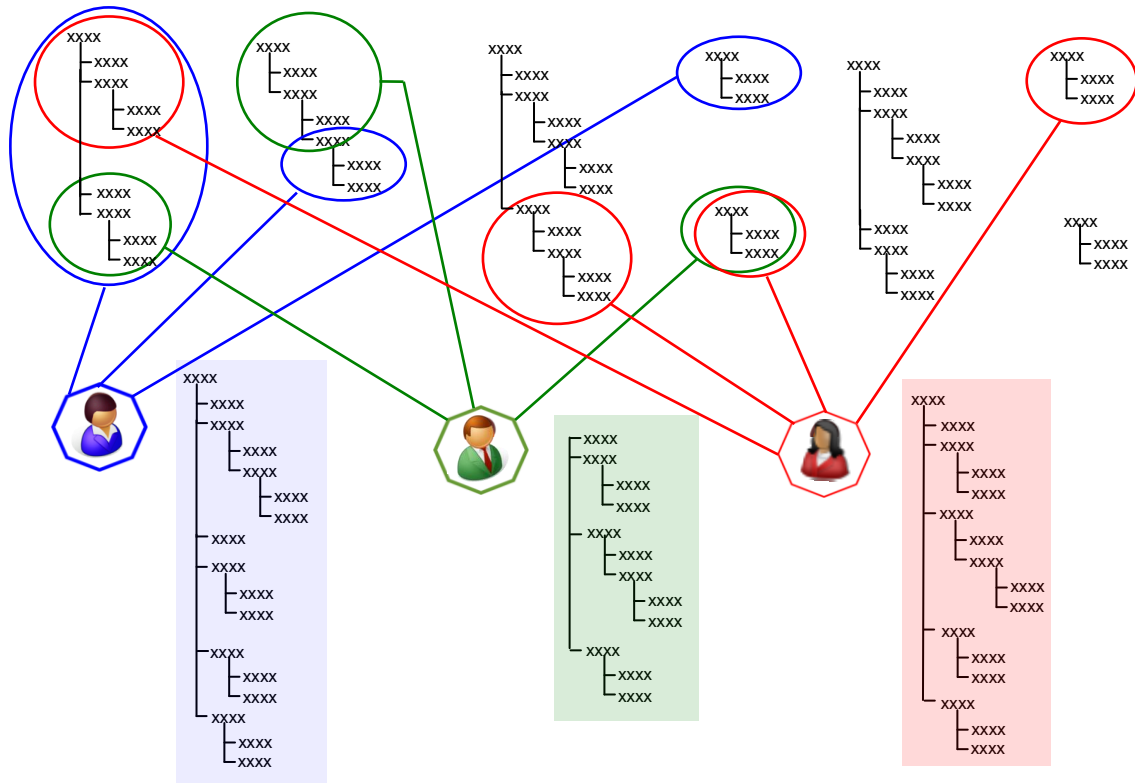
Most people need to contribute to a wide range of tasks. Tasks may part of strategies, projects, routine tasks, improvement tasks, special one-off tasks, etc. The diagram on the next page shows a common way of relating tasks (represented by xxxx) in a work breakdown tree of parent child relationships.



The most important point to note is that there are many independent trees of tasks. In most cases, tasks are not logically connected.

A person is likely to be involved in many tasks from strategies, projects, routine, improvement initiatives, etc. Usually relevant tasks are in many unconnected task trees, and in some cases, different parts of the same task tree. For example, a project may have 1000 tasks, but only 100 are relevant to a particular person. Plus these relevant 100 tasks are most likely spread across the 1000 tasks.

Currently it is up to each person (often with the assistance of managers) to sort out relevant tasks. The diagram below shows a snapshot of how three people have sorted through a lot of independent task trees to construct a personalised view.



The scary thing is that most people have many more tasks to sort out (than shown in the diagram) and that they do it in their head. The challenge is compounded further when people collaborate, because the people collaborating will have different perceptions of tasks they are involved in and these perceptions are likely to change over time.

These inability of people to maintain a consistent view of relevant tasks and how they fit together places a major limitation on how people collaborate and what they can achieve. It also contributes to high levels of stress and a tendency to focus on local (urgent) tasks rather than more corporate (important) tasks.

Challenge 3 – Automatically creating a ToDo list for each person.

Applying personal time management methods has been shown as a very effective way to optimise personal outputs. However developing and maintaining a To Do list is becoming increasingly difficult in our busy workplaces.

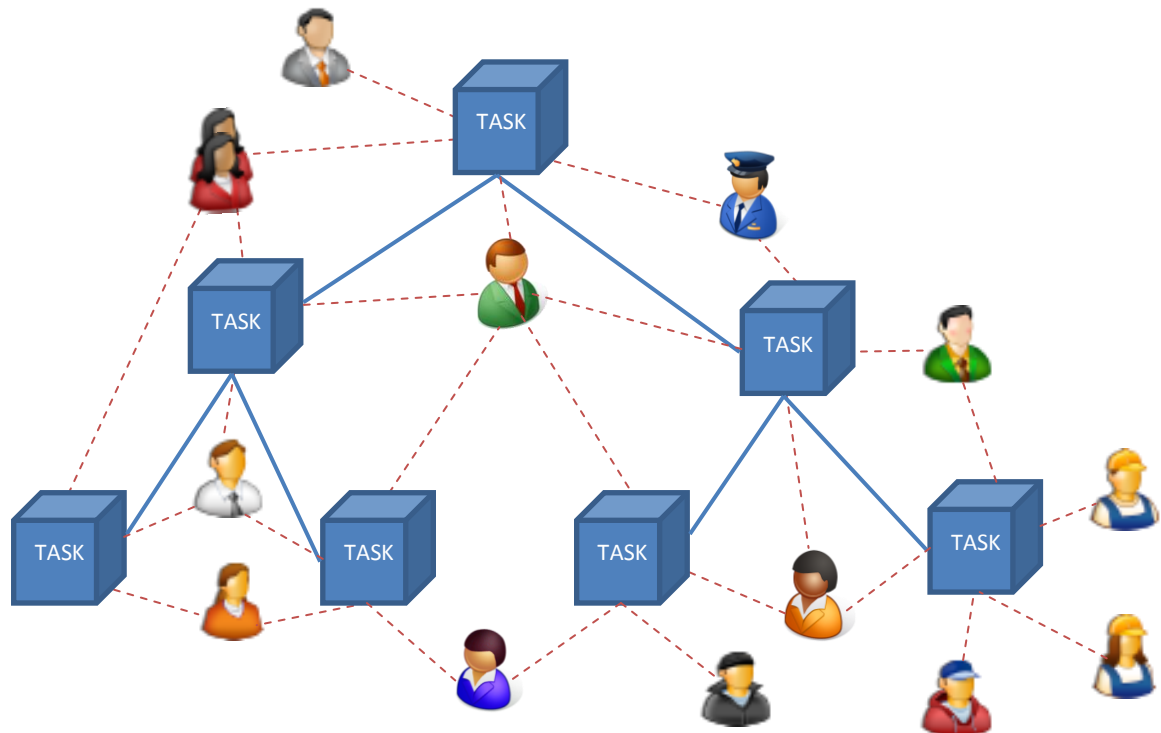
Personal ToDo lists are important, because they ensure that actions are not missed or forgotten (fall through the cracks). The next requirement is to synchronize people's ToDo

lists, so work keeps flowing. An effective method to create and synchronize To Do lists will revolutionise how work is managed.

Note: The task tree list in Challenge 2 provides a context map of how tasks fit together, whereas the ToDo list includes all the actions that a person needs to do for all their relevant tasks.

Challenge 4 – Supporting Teams

People naturally work together in teams to do tasks. So a global management system needs to support people working together in teams to complete tasks. The diagram below shows how people form teams to complete tasks. Tasks are done through people, so the people (team) structure/framework is just as important as the task structure.



Two types of teams need to be supported. The first type of team provides task context and includes all stakeholders (people involved directly and indirectly) in a task. The second type of team focuses on people actually doing work to complete a task.

Teams may be physical or virtual. In some ways, team processes for virtual teams are more important than for physical teams where verbal and non verbal communications can assist in team management.

Challenge 5 – Security and Privacy of Task & Team Information

Task and team information is core to an organization's plans and operations, so it needs to be kept secure. In some cases, people from outside the organization may need to see relevant tasks to do work for the organization.

In simple terms, task and team information needs to be available on a need-to-know basis. Management of privacy and security needs to be integrated into core processes, so it is simple to administer and audit.

Research confirms that organizations want to use the Internet, but generally want to keep the majority of their task and team information within their firewalls. However they are

comfortable with selected information being shared with team members outside their organization on a need-to-know basis. Consequently a hybrid solution that secures the majority of an organization's task and team information within its firewalls and allows approved information to be synchronized with people in other organizations is required.

Challenge 6 – Keeping work flowing when people are separated

It is common for people working together to be separated in a way that adversely affects the way work flows. Separation may be due to one or more of the following: physical separation, organizational separation, technical separation, time zone separation.

Keeping work flowing requires basic work processes that easily fit together and continue to work, even when people are separated. Meetings and unstructured collaboration tools like phones, email, instant messaging, chat, VOIP, and video conferencing reduce the adverse effects of separation, but simple consistent collaboration processes are essential.

Challenge 7 – Automating many Functions of Management

Traditional management systems focus on largely local situations where the manager can control, or at least influence, how people are using their time and effort. There is a strong reliance on managers personally implementing the functions of management: goal setting, planning, organizing, leading, monitoring, communicating and coordinating. Personal involvement allows a manager to gain the knowledge required for effective problem solving and decision making.

It is not appropriate to automate all the functions of management. In particular, goal setting, initial organizing and leading require managers to solve problems and make decisions. However significant parts of planning, organizing, monitoring, communicating (including feedback and reporting), and coordinating can be automated.

A recent survey of work practices across 200 countries (commissioned by Microsoft) found that up to 30% of people's time is devoted to manually doing these functions. Consequently automating large parts of these functions will provide people with more time to do productive work.

Challenge 8 – Feedback and Reporting

People need to know what is planned to happen and what is actually happening. Relevant feedback needs to be constantly provided so it can be digested and appropriate decisions made to account for changes.

Feedback needs to be recorded in one place, so it is easy to be updated on what has occurred since you last looked. Feedback also needs to be provided by automatic email (Outlook, Notes, Yahoo, LiveMail, etc) so you can quickly find out what is happening that affects you.

Progress and other reporting needs to be available 7x24, so informed decisions can be made.

Challenge 9 – Templates & Contingency Plans

People invest a lot of effort into doing tasks. In many cases, tasks that need to be done in the future will be similar to tasks that have been done in the past. Consequently a simple way to template tasks (copy and reuse past tasks), so they can be updated and pasted to provide a head start on the planning of future tasks is required.

An interesting finding from TASKey's research is the need for people to be able to join their personal templates into an overall task framework. This flexible reuse of past work saves time and underpins continuous improvement.

An important use of templates is to develop contingency or business continuity plans that can be instantly pasted into current plans and on-going work. This allows each person to quickly assess their ability to do the work required in a contingency plan (given all the other work they are doing).

PART 2 – A Solution to the Nine Core Challenges

Introduction

This part describes TASKey's new global management system that gives all managers and team members critical task and team information not available using current methods. Clear accountability, real-time progress reporting and timely feedback not only improve productivity, but reduce frustration by clearly showing each person's involvement in relevant tasks and exactly what they need to do.

TASKey's new global management system and the web software tool to apply it consistently provide a solution to the nine core challenges. The solution manages work through people and automates many of the complex and time consuming management tasks needed for high productivity.

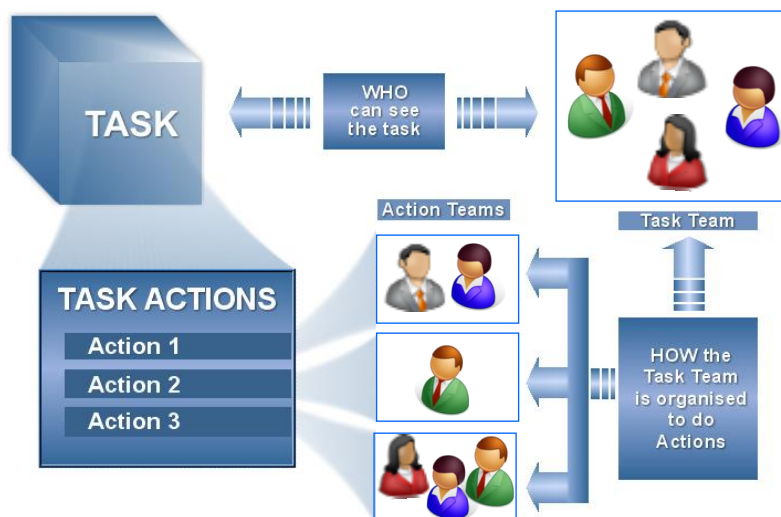
The nine core challenges discussed in Part 1 were:

- Challenge 1 – Scalability
- Challenge 2 – Automatically sorting out Relevant Tasks for each person
- Challenge 3 – Automatically creating a ToDo list for each person
- Challenge 4 – Supporting Teams
- Challenge 5 – Security and Privacy of Task & Team Information
- Challenge 6 – Keeping work flowing when people are separated
- Challenge 7 – Automating many Functions of Management
- Challenge 8 – Feedback and Reporting
- Challenge 9 – Templates & Contingency Plans

The solution will be related to each of the challenges. Only the primary challenge will be mapped. However there are many overlaps where one component of the global management solution addresses many challenges.

Solution Overview

One simple module (challenge 1) gathers and stores the critical task and team information for every task. Linked modules provides essential context for finding other information.



The minimum data required is the task and one or more stakeholders (called the Task Team). More detail is added by a dynamic list of actions that creates a simple flexible workflow. The person or people doing each action are called the Action Team.

Task modules are joined in easily scalable parent child relationships that can be easily modified (challenge 1).

Personal views of relevant tasks are created on the basis of task team membership (challenge 2).

ToDo lists are created and synchronized on the basis of Action Team membership (challenge 3)

Task and action teams are explicitly supported and responsibility and delegation are correctly applied (challenge 4).

Team membership is independent of organization structure and position, so any person within an organization or in another organization can be made a team member. Consequently boundary issues can be easily eliminated (challenge 4).

The person responsible for each task team or their delegate authorises team membership. So people who do not need to see the task can be easily excluded. This is a simple yet extremely powerful way to manage security and privacy (challenge 5). No passwords or permissions are required, just task team membership (that can be easily added or denied by the accountable people).

TASKey has developed a capability for people in different organizations to be task team members of a selected task. Consequently changes by a person in one organization can be instantly shown to a person in another organization (challenge 6). TASKey has developed a technical solution that keeps relevant task and team data in different organizations synchronized (even when people are using different TASKey TEAM servers).

TASKey has spent over 7 years understanding and replicating critical task and team processes present in the functions of management. These processes have been automated to make the use of TASKey web software easy and to maximise the effectiveness of task and team interactions between people (challenge 7).

A benefit of automating critical task and team processes is that critical feedback to all task team members can be provided in close to real time. In addition, progress (including automatic Gantt charts) and related reporting is available instantly, so everyone knows what is happening and timely remedial action can be taken if required (challenge 8)

TASKey TEAM software has inbuilt tools to create templates of work already done (right down to action workflows). In the process of pasting a template, a simple wizard offers the unique ability to change team membership to match the people available to do the task(s) (challenge 9). Templates can be added by many people to create a composite that matches the way people want to work.

Templates can be used for contingency or business continuity plans (challenge 9). The significant benefit is that when a contingency is pasted, all relevant people's task tree and ToDo list are populated with the contingency's tasks and actions. People can then quickly determine if they have the availability to make the desired contribution to the contingency.

Key Benefits

The key benefit of the **global management system** is to provide a simple means that allows people to productively work together, by providing sufficient structure to keep work flowing globally.

Key features of the TASKey **global management system** and web software tool are that it:

- Accommodates all management styles and approaches
- Integrates all levels of management from strategic to personal ToDo's
- Works both within and between organizations
- Is not affected by organizational structure, geography or time zones
- Sorts out task management information for each person
- Automates planning, organizing, tracking, coordinating, feedback and reporting processes
- Maintains security and privacy
- Includes templating tools for fast planning and continuous improvement
- Provides an audit trail of key actions

Key features are now explained in more detail.

- **Accommodates all management styles and approaches**

TASKey employs a simple task and team module that can be easily fitted together in many ways. The method makes it easy for people using different management styles and approaches to seamlessly work together. Both formal and virtual teams are accommodated.

- **Integrates all levels of management from strategic to personal ToDo's**

TASKey web software can be used for strategic, operational, tactical, team and personal management. All levels of management can be linked together so there are no gaps or demarcation disputes.

- **Works both within and between organizations**

Most management systems are confined within an organization and constrained by function (such as governance, program, portfolio, project, risk, quality, safety). These systems create significant barriers within and between organizations. TASKey's generic management solution works within and between organizations and is not constrained by functions. So boundary issues are eliminated.

- **Not affected by organizational structure, geography or time zones**

TASKey TEAM works on a person to person basis through team (stakeholder) membership, not organization structure. Intranets and the Internet overcome physical separation and operating in different time zones is coordinated.

- **Sorts out task management information for each person**

TASKey TEAM automatically creates a relevant task tree (map) and a ToDo list of the actions required for all relevant tasks. As a bonus TASKey TEAM keeps all users' ToDo lists synchronized by updating shared and private actions in real-time.

- **Automates planning, organizing, tracking, coordinating, feedback and reporting processes**

Management functions are: goal setting, planning, organizing, leading, monitoring, coordinating and communicating. TASKey has developed and validated a web software tool called TASKey TEAM that makes these management functions easy to apply globally. The key has been to automate the many processes that underpin these management functions.

- **Maintains security and privacy**

TASKey TEAM employs an unbelievably simple patented method to achieve global security and privacy. Security and privacy on a need-to-know basis keeps people focused and stops them being overwhelmed with irrelevant information.

TASKey's unique technical solution allows selected task and team information to be synchronized between TASKey TEAM servers (enterprise and/or hosted) in different organizations over the Internet. This ensures that the majority of an organization's task and team information is contained within each organization's firewalls. Only selected task and

team information is passed outside the organization. This information is encrypted and can only be seen on a need-to-know basis.

- **Includes templating tools for fast planning and continuous improvement**

Reusing a template of how tasks were completed in the past saves considerable time and effort when similar work is required in the future. Templates can also be used to create contingency plans and business continuity plans that can be instantly pasted into the current tasks and ToDo's. Templates can also be used for benchmarking to measure continuous improvement.

- **Provides an audit trail of key actions**

Often understanding why something occurred depends on knowing who did what and when. TASKey TEAM instantly notifies relevant people when something important occurs. So a review of notifications provides an audit trail of key actions that occurred.

Differentiators

TASKey's Global Management System and web software tool is different to other management systems in that:

- it addresses all nine core challenges,
- it provides a simple but comprehensive means for people to work together productively,
- most of the processes required to implement the functions of management globally (tracking, monitoring, coordinating, informing and reporting) have been automated, and
- training takes about 3 hours (because complex sorting and management processes are automated).

Conclusion

Nine core challenges that are stopping people reaching their potential to effectively work together were identified. Many of these challenges are accepted almost universally as givens that cannot be changed. However after over ten years of workplace research and development, TASKey has evolved a comprehensive management system that addresses all of these challenges.

TASKey's new global management system and the web software tool to apply it consistently provide a comprehensive solution to the nine core challenges. The solution manages work through people within and between organizations, and automates many of the complex and time consuming management tasks needed for high productivity.