

Success Story: AT&T eSales and Service

AT&T's eSales and Service division finds Project InVision on-demand software manages its 150+ customers' projects with ease

CHALLENGE

AT&T's eSales and Service organization manages AT&T Business' electronic sales and customer care channel. It is focused on improving AT&T's customer experience through the overall design and implementation of electronic based service applications that are part of the AT&T BusinessDirect portfolio and att.com/business Web site. Additionally, the organization is responsible for customer training and adoption of the applications while ensuring that the processes are in place to meet customer expectations and needs.

In 2002, the eSales and Service organization was increasingly challenged to stay on top of an average 80 customer projects open at any one time. Critical project information was not shared across eSales and Service teams. Systems and tools for data input and project management varied widely. As business grew, they needed a single point of information to reduce email overload and ensure common understanding. Moreover, they understood the need to improve project portfolio management and develop stronger processes.

SOLUTION

Dave Davis, PMP, a senior project manager with eSales and Service, was searching for software that would track critical dates and other project milestones across a portfolio of projects using a single data source – a project portfolio management solution.

"We knew our pain points," said Davis. "We had this huge funnel of projects, and we wanted to manage our portfolio with quality gates at standardized phases and track our projects and teams – to see our status at a glance. We knew we needed a single point of data."

As Davis began his search for a solution, another division of AT&T recommended Project InVision's Project Portfolio Management software.

Davis quickly knew the software was a fit, in part because of the ability for Project InVision to adapt to meet his division's needs and AT&T's methodology and business processes.

The screenshot displays a web-based project plan for 'eSelling Project Plan'. It includes a header with project ID '845' and title 'eSelling Project Plan'. Below the header, there is a section for 'Business Narrative' and 'Project Assumptions and Constraints'. A table lists team members with columns for Name, Job Title, Phone, and Email. The table contains three entries: Dave Davis (AT&T Senior Project Manager), George (AT&T Manager Direct Sales, Analytic), and David (AT&T Client Business Manager). The interface also shows a list of tasks or milestones with checkboxes and dates.

Name	Job Title	Phone	Email
Dave Davis	AT&T Senior Project Manager	(800) 555-1234	ddavis@att.com
George	AT&T Manager Direct Sales, Analytic	(800) 555-1234	gsmith@att.com
David	AT&T Client Business Manager	(800) 555-1234	ddavis@att.com

Project plans for eSales and Service are generated from Project InVision data; the reports can be produced in a number of formats, including Adobe PDF, and shared with clients and others.

"We try to put every document and artifact in Project InVision," said Davis. "It helps that we can sign off on documents directly in the tool."

The issues management process for eSales and Service was a value-added development built collaboratively with Project InVision. The software reports on issues daily and sends emails to end users.

"Our notifications are structured more like sports scores than CNN Headline News," said Davis. "We built a daily planner that reports each morning on the previous day's issues and events."

#	Artifact Type	Artifact Title / Link	Author	Comments
11	RFQ	RFQ - ERM Deal: Coopers	Hirsh, George	An RFQ was document from (internal) title: An official ECM document. Linked to SRD for approval.
13	RFQ	RFQ - ERM Deal: ERM Deal	Hirsh, George	The RFQ is intended for a RFI. Not for purchase from AT&T.
21	RFQ	RFQ - Checking	Hirsh, George	Indicates attached a linked document. An actual the deal from (internal) title: an official ECM document.
43	CI Plan	CI Plan - CI	Hirsh, Hart	CLOSURE PLAN
42	CI Plan	CI Plan - CI	Hirsh, Hart	
27	Other	Customer Service Request	Hirsh, Hart	From: George, V. CMO Sent: Thursday, July 20, 2006 10:41 AM To: William, C. CLAS, Manager, HARVARD ALUMN C.E.C.
41	Other	Customer Service Request	Hirsh, Lisa L.	
28	Meeting Minutes	Customer Service Request	Hirsh, Hart	
25	Meeting Minutes	Customer Service Request	Hirsh, Hart	
31	Meeting Minutes	Customer Service Request	Hirsh, Hart	From: Hirsh, P. K. (Pete) CMO Sent: Wednesday, July 20, 2006 6:24 PM To: Holly, Barbara G., VICE PRES., Manager, J. (Holly) C. Daily processed on customer call at 2.
3	Other	Customer Service Request	Hirsh, Lisa L.	
12	Other	Customer Service Request	Hirsh, Lisa L.	Indicates a linked document. Downloaded by (internal) title: An official ECM document.
15	Other	Customer Service Request	Hirsh, Lisa L.	
16	Other	Customer Service Request	Hirsh, Lisa L.	
14	Other	Customer Service Request	Hirsh, Lisa L.	Started this project on previous account.
24	Other	Customer Service Request	Hirsh, Hart	The Change Request will require. Each asset connected with CRM will be identified in CRM. The identification

Linking project documents is easy; AT&T captures the value of Project InVision's document check-in/check-out, approvals and revision tracking.

Issue ID	Issue Title	Project	Issue Statement	Issue Status	Priority	Priority	Resolutions
001	Invalid Message Structure Error	001	Customer received an email of Message Structure Error from the Customer during some activity testing using the On Profile action. Also question on password type (use clear or not on type?)	Open	Medium	Medium	Request sent to Mail. Mail indicated that it could be CAPED as well as determine business backends that probably run the inclusion of that return. Mail indicated that response will be possible by 8/4. Can it be resolved? Who has the responsibility for the Gateway?
002	CRUI GetCKL Issues	002	Customer looking for a workbook or data source to find this information.	Open	Medium	Medium	Customer Service Request

AT&T uses Project InVision to manage tasks at the milestone level; the software is synchronized with Microsoft Project.

BENEFITS

Today, AT&T eSales and Service has 80 Project InVision users and has reduced the team to one project plan of record. More importantly, they are completing more projects successfully and at lower cost.

Fifteen percent more projects are done on time and on budget today than when AT&T eSales and Service began using Project InVision Project Portfolio Management in 2002. The team has also expanded the scope of projects and now has an average of eight open projects per project manager, up from six per manager.

"Management likes Project InVision, because they feel it can help the project managers do more," said Davis.

Davis says his 12 eSales and Service project managers also see the value of Project InVision because of the consistency it provides in their processes. The team has 20 percent fewer issues per project because of the maturity of their processes.

Project InVision Project Portfolio Management helps Davis continually improve his organization – capturing lessons from the project portfolio to improve performance in costs, quality and time.

“One of the most powerful benefits is our ability to relate issues across the project portfolio,” said Davis. “We can link common issues.”

Forecasting became easier, too, according to Davis, which was important with outsourced testing resources and other suppliers.

In short, Davis finds Project InVision on-demand software helps him manage the project portfolio effectively, aiding AT&T’s eSales and Service division with a common, repeatable and continuously improving methodology.

“We don’t know what we would do without the tool,” said Davis. “It’s invaluable.”

FOR MORE INFORMATION

Visit <http://www.projectinvision.com> or call (888) 763-3555 for more information on how Project InVision Project Portfolio Management can lead your team to increased profitability and higher client satisfaction by increasing visibility, governance, and control.

ABOUT PROJECT INVISION INTERNATIONAL

Project InVision International provides software solutions to improve business performance to professional service firms and their clients including industry leaders like PricewaterhouseCoopers, KPMG International, AT&T, EDS, and TELUS. Project InVision’s enterprise and on-demand platforms help businesses automate processes such as Project and Portfolio Management, Governance, Risk and Compliance, and Professional Services Automation. Project InVision International, founded in 1991, is privately held and headquartered in the San Francisco Bay area.

