



SOCIETY OF ACTUARIES

Article from:

# The Stepping Stone

July 2010 – Issue 39

# Getting Started When You're Overwhelmed

by Scott D. Haglund



Scott D. Haglund, FSA, MAAA, is AVP STD and Service Pricing at Unum. He can be reached at [shaglund@unum.com](mailto:shaglund@unum.com).

**A**lthough Gantt charts and timelines look great when completed, what do you do when you don't even know how to get started? The forms and templates work great when you're an organized person, but at times, having an informal process that gives a flexible structure can be a great aid. Although not an expert in planning projects, I am an expert in being stuck and, at times, having a hard time getting started. The thoughts that follow can assist if you find yourself in the same situation.

## DISCOVER

The first step in any project is figuring out what the problem or issue is. This is different than working on what someone has requested. The true customer need may not be what they asked for.

In this step, you may already have a good idea of what needs to happen, but you also begin looking at where you need to go. At this point, don't constrain yourself; capture what really needs to happen and use future steps to bring the project down to what can get done with what you have.

By carefully defining the reason for the project, natural steps and tasks will likely begin to develop. For example, you may have a claims-related project and questions about blocks of business of product types may begin to form in your mind. From these questions, a few tasks that may need to be captured are data review and analysis that determine what you can actually capture or what is currently present.

Within this step, you should connect with a variety of internal (and potentially external) customers to define what the need really is. You will discover what issues the customer is currently experiencing and other attempts that have been made to resolve this situation. No promises are yet being made, but you are listening to discover what must be accomplished. Rarely can a project be completed in a vacuum; getting outside input and support will always benefit the final product.

## DESIGN

After defining the goal of the effort, begin working on what your final results should look like. If you have your goal in mind, it will be easier to set up what needs to happen to achieve it. Again, don't constrain yourself here; you may need to trim certain pieces of it due to time or resource constraints, but the ultimate goal should at least be captured.

Mocking up the spreadsheet or report will get your mind thinking about getting them populated. However, as you begin developing the final product, make sure you are capturing what was desired in the Discover phase. Working with your business partners in the Design phase can be a great help in that you won't design something that needs changing later (and it may be more time consuming to do it then).

At the end of the Discover and Design phases, a project plan should now be captured to get your project moving. Start by writing down a high-level outline (significant steps or milestones) and jot down your thoughts on each main point to fill out other steps. Make sure to use your style to make the collection of steps easier to develop. If you like shapes and colors as you design, do it. If you work best from a formal step 1, 2, 3 outline, use that.

The key is to gather as many thoughts and steps as you can to better define what needs to be accomplished. To make the list better, rely on someone else to review to see if you're missing anything. If someone else has completed a similar project, talk to them about significant items to include or issues they encountered. By incorporating the opinions of several individuals, you are more likely to have captured the steps involved than just doing it yourself.

## DO

Based on the Discover and Design phase, you can begin doing the project. However, before doing, you need to make sure you have the overall plan in place. It's possible that by wandering you may stumble

upon the final product, but the time involved and the quality of the project will be greatly sacrificed. The plan may just be a quick flowchart or several bullet points, but you should have something tangible written down so you can tell when you've finished.

As you work through the steps, continue thinking about how much time each step may take and what your overall deadline is. As appropriate, communicate the project status to your business partners, any issues you've encountered and when you expect to deliver something for review. As you develop your timeline, keep in mind that someone else should review your work. The review phase of the project is critical and needs to be incorporated in the timeline.

As changes in your plan are requested, consider what the overall impact will be to the timing and determine if the request can be accommodated. You may not be able to just say no, but by explaining the overall impact to the project, you may be able to get agreement that the request could be included in a future revision. Another option is to compromise on what is included so the intent of the request is accommodated, but possibly not to the degree that the individual desired.

A key part of the process is documenting what you've done. Documenting your work as you progress easily captures the decisions being made and the work flow to reproduce what was done. The documentation is written as much for you as it is for others. By writing down your process, you may discover mistakes in logic or you may begin questioning decisions that you made. The documentation is also critical to anyone who needs to review your work and to anyone in the future who may need to run your process. Waiting until the end of the project may make the documentation difficult and actually more time-consuming than doing it as you are actually completing the work. A key question for documentation is: would this make sense to someone else?



## DEFEND

Once the initial solution has been completed, begin reviewing the work to make sure it met the criteria established in the prior steps. You need to be comfortable with what you achieved before sharing the results with your business partners. As part of this review, it is always a good idea to have at least one other person look over your results. Having it reviewed at this step will make it easier to catch errors before your partners look it over. Correcting the obvious errors before your partners see the results will give the project more credibility.

After the initial peer review, allow your partners time to examine your solution to make sure it addresses what they see as the issue and meets their need. Likely this will be the same group of individuals you identified in the Discover phase. As questions arise, this may provide a cycle between the Do and Defend steps until all parties are comfortable. Getting agreement in this step will make the implementation of the solution much easier and more widely accepted within the organization.

CONTINUED ON PAGE 28

## DISTRIBUTE

After your partners are comfortable with what you've developed, you can now begin implementing what you have accomplished. After getting agreement on the final version with your business partners, modify the documentation as needed to incorporate the changes included. This should include any changes in the process from the original design as well as reasons behind the changes.

A clear communication should now be sent out to the team involved informing them of the agreed-upon solution. In addition to the results, make sure to include next steps or future actions that were deferred due to resource or time constraints. You should also include the frequency of any updates and where they can find future reports (by e-mail, specified directory, etc).

Most projects will include the five phases described above, but with differing degrees of importance. For example, if a project is internal to just your team and results are not shared, the Discover phase may already be well known so this may be done quickly.

However, it doesn't mean that this step should be ignored. Even an internal team project will benefit from physically writing down the steps, as new insights may be obtained as you work through the project plan.

A key consideration with any project is the interaction of time, cost/resources and scope. In some capacity, you will likely have constraints on one or more of each element. As changes are requested, your plan and project will need to be modified so this balance is maintained. For example, if your deadline and resources are fixed, any changes requested would need to be balanced by changing the scope and deliverables from the project.

By following the steps listed above, you won't have a perfect project, but you will create a plan that will at least get you moving. The key is finding something that works for you, not what works for someone else. You don't have to do this alone; working with others on your team or organization will provide the guidance and support you need to be successful as you complete solutions impacting your organization. ●