

Moving with the times:

a case study of M&G's timesheet implementation

Municipal & General had only been using Innate Timesheets for a month when Kate Winterbone gave this talk on its implementation at the Innate User Day at Bletchley Park on 16 May 2001.

Software implementation is difficult. Either there are technical problems or people find it hard to change and to adopt the new ways of doing things. But it doesn't have to be like that.

A company born in the early 1900s is tackling the twenty-first century with gusto, according to Kate Winterbone of Municipal and General. Known more commonly as M&G, it was back in 1931 that someone there had the bright idea of inventing unit trusts, then called fixed trusts, and the business began to take off. Now based in Chelmsford, Essex, its 1600 administrative staff occupy four buildings. Alongside Kate, about 100 people work in Information Systems (IS), and they manage a combination of environments - PCs, mid-range and mainframe systems. They have about 50 projects live at any one time. Approximately ten of these are what they call investigations and the rest are implementations. Some implementations are large, such as changing all the systems they are using - and some are small, such as implementing Innate Timesheets software.

Historically, M&G's philosophy on time recording was limited to internal IT development staff. There was no formal tracking or reporting of time against budget; in fact, actuals and budget figures were kept separately. No invoicing was effected from the figures put into the time recording system: the figures were merely used to create monthly 'pretty pictures' to see what was happening in the company.

The decision to change their time-recording system was made for several reasons. Their old system was not meeting their requirements, and the supplier was not up to scratch and was not solving their problems. It was an increasingly onerous task to run

the system. The time required to keep the system up and running and to keep users happy was "beyond belief". Reports produced from the old system were inaccurate, despite all that effort. Although the old system did link back to Microsoft Project plans maintained by project managers, it caused data corruption so the project managers ended up with two sets of plans in order to cope: one set enabling people to record their time and the other set tracking the project. M&G took the decision to move away from their timesheet system interacting with Microsoft Project because that's where over half their problems were concentrated.

As Projects Office Manager, Kate was involved in setting up a seemingly obvious solution. "We consulted our users by creating an internal user group made up of representatives from each section in M&G. They were asked, "What do you want?" The answer was: "Change the system. Your biggest fault is the system you're using."

"We chose Innate in October 2000 after a demonstration from Brian Spurr, Innate's Area Sales Manager, because the Innate Timesheets system is very, very straightforward," says Kate. No training was provided. The idea was that anyone who had been working with a Windows package would be able to use it. People had already been on (mandatory and unpopular) training courses to learn to use the old system and they were too busy for more training. Instead, an internal User Guide was written, outlining why time recording was necessary, what the internal procedures were and when the timesheets were due and when reports from the timesheet system would be executed. Simple instructions were included: "We told them what they needed to know and no more. And it's worked!"

"Innate wanted me to talk about the problems we've experienced implementing and running the system in the early stages. But we really haven't had any problems at all..."

Kate bubbles with enthusiasm. "We've had no problems with people using the system. It was almost seamless."

Time recording is a massive administrative burden for so many people. Although the timesheets system is being extended from the original 300 IT staff to 1600 staff, it will be a slow process. More formal reporting is being done, with the tracking of actuals against budget - although the figures are still not concurrent. This is because they are undertaking administration for third parties, and the invoicing for them is being achieved using figures straight from the Innate database. The time recording system is still being used as a reactive system to report on where the effort is being expended. However, since implementing Innate Timesheets, early indications are that the burden of administration is being reduced - although it's still more than M&G would like it to be. Before implementing Innate Timesheets, two people worked full-time on time recording, and it took almost a week to produce monthly reports. These performance figures are being improved very quickly already.

"All M&G personnel will be recording their time. Forward planning, tracking and reporting of actuals against budget will become the norm," states Kate. "We'll be invoicing not only for third parties but for all sorts of things. The problem is with getting people to put their time into the system. You can give them any system you like, but they still have to fill in their timesheets properly. The information coming out is only as good as that going in. We are investigating the possibilities of having a link between Innate Timesheets and the payroll system for contractors and

possibly for people's overtime records. This would mean that people could not be paid for overtime unless they filled in their timesheet."

"We want to use our time recording system as a pro-active as well as a reactive system at M&G", says Kate. "We want to link it in with Microsoft Project as well as look at what happened over the past month and to try to predict what's going to happen in the month ahead."

"One of the decisions we took when we got Innate Timesheets was not to use the Microsoft Project interaction. We use Innate Timesheets as a stand-alone product. Obviously, the interaction with Project gives us the opportunity to use it as a planning tool as well as just a reactive system. We hope that, one day, time recording will just become an administrative task that just goes

on in the background and is hardly noticed." Kate is very positive. "Early indications show us that this is a realistic target, which, only two months ago, did not seem possible."

How do they use Innate Timesheets? "We implemented Version 4 as a stand-alone package (with no Microsoft Project interaction or timesheet approvers). We have about 300 users - going from 100 to 300 in a month, which is achievable." Kate estimates that, although they have not set interim targets, they want to meet the 1600-user target by the end of 2001. Because they have set up a basic system, and as people become comfortable with using it, they will start incorporating more features. "We will have interaction with Microsoft Project plans one day," says Kate. "Our experience so far has been good."

How do they handle the data? Data is extracted from the Innate Timesheets database by exporting it to Excel, where it is manipulated. The new reporting features will eliminate a lot of the manual work being done in Excel. This works, but is still time-consuming. OLAP reporting should cut time even further.

"The only faults we came across were of our own making. We assumed, for example, that everyone has access to the Intranet, but they didn't. As far as implementing the system goes, we've have had very little interaction with the Innate support team, and when we have they've been very, very helpful. We certainly recommend Innate Timesheets."

Kate Winterbone, M & G, speaking at the Innate User Day, 16 May 2001.

Contact Innate at:

United Kingdom and Rest of the World

www.innate.co.uk

Innate Management Systems Ltd
1 Christies Warehouse
Wherry Quay
Ipswich IP4 1AS

T +44 (0)1473 251 550

F +44 (0)1473212177

sales@innate.co.uk

USA and Canada

www.innateus.com

Innate Inc
One Gateway Center
Suite 2600
Newark NJ 07102

T 888 371 3350

F 530 685 4467

sales@innateus.com

