



SOLVING LEADERSHIP DEVELOPMENT CHALLENGES ..... We've been asked for years to present examples of how we have used simulations to solve difficult leadership developmental challenges. .... Finally we have compiled a variety of case studies and a platform to present them.....

These case studies are grouped around 4 subjects: (1) Project Management (2) Business Acumen (Finance) (3) Leadership and (4) Operations Management.

## PROJECT MANAGEMENT

### Case Study: GLOBAL INSURANCE COMPANY

**"Project Managers who don't "see" projects -- so don't manage them"**

**Disconnect:** Though corporate audits are, in effect projects, they are often not treated nor managed as such. Auditors are mostly trained in finance and audit so they did not "see" they were managing projects. Moreover, they felt that the administrative burden of tracking audit progress and costs was time-consuming and didn't add any value.

Worse still, many auditors did not proactively manage their audits, believing they were not in control of their ultimate outcomes. Outside events that they never thought to factor in at the outset of an audit would ultimately become their excuse for under-performance and failing projects. Finally only a few had and correctly used a project planner and scheduler like Microsoft Project; unfortunately tools alone do not constitute a complete project management solution.

**Conclusion:** Auditors clearly needed to "see" themselves as project managers and learn more about that discipline and adopt a workable project management method they could apply easily to their 150 audits each year.

**Solution:** This global insurance company recognized this disconnect, and the need to build a methodology and provide fundamental project management training to their auditors. L&D professionals saw conventional ILT training would not work with this analytical population and e-learning would never be completed.

Through consultation and analysis across a spectrum of internal auditors, line managers, group heads, and HR personnel, PCI Global supported the client and

together took existing company processes along with PCI recognized tools and templates to build an audit project methodology.

**Design:** For learning, PCI modified an existing simulation to replicate a typical audit (project) with tasks, resources, costs and delays. They even **simulated people**. The simulation compressed 4 months of project audit experience into 2 days with typical problems 'popping' up during each run. The client and PCI then took the company methodology and built it into the instructor led class to teach tools, templates and skills.

The resulting course provided experiential learning in the fundamentals of audit/project management plus methodology, terminology, concepts, tools and templates with a simulated project to practice in a safe environment with **immediate feedback on results** for optimal adult learning.

**Results:** By integrating the experiential simulation with the customized courseware, the client acquired a unique "hands on" learning experience that addressed all of the basic principles of effective project management in *their unique audit environment*.

**Level I** - Evaluations rated the course an average on **TIME WELL SPENT 97%**.

•i.e., we wasted 48 minutes out of 16 hours!

**Level II** - Measures showed an average increase of learning from 62.65 to 85.60 an increase of **23%**

**Level III** - Application showed 80 graduates have seen astonishing results with performance now at or below upper limits of 120 days/audit, and within or below 2000 budgeted hours, depending on the size and complexity of the audit.

