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**Global organizations can break down geographical and operational barriers to manage worldwide efforts effectively and efficiently.**

**BY HELENE S. GIDLEY**

**a**s mergers, acquisitions and ever-expanding markets become business as usual, global or geographically distributed project teams must meet the challenge to operate effectively, efficiently and economically. When Pfizer Inc. and the former Warner-Lambert merged, both companies felt the pressure to share and manage information beyond the geographic and organizational boundaries either company had faced before.

Three years into a global reorganization, Pfizer's Information Management (IM) organization has reorganized itself into lines of business to enable true collaboration, knowledge sharing and work efficiency. Looking at this example, other global companies can improve upon the efficiencies of their own dispersed project teams.

### Global Union List

Pfizer's scientists use IM Document Delivery to provide articles from a variety of scientific and business journals, which may or may not be part of the Research & Development (R&D) library's collection. The ideal scenario is to search the journal collections of each Pfizer major library, fully capitalizing on the investment in these collections.

Prior to the Pfizer/Warner-Lambert merger, each IM R&D library would look first in its own collection to locate the requested articles. If not found there, then the search was expanded to public sources and libraries. If the requested article still was not found, an outside firm was commissioned to locate the article. With each library's collection

maintained in separate databases, no tools were in place to query other R&D library collections.

In library sciences terms, a single collection of journal titles and related information is called a "union list." After the merger, IM wanted to more fully utilize the journal collections across the libraries globally and reduce the number of requests to outside firms. To meet this need, the Pfizer IM department began its effort to launch a Global Union List application.

### Defining the Team, Scope and Responsibilities

Following a formal system development methodology, the Global Union List team included the project sponsor from the IM Leadership Team, the project manager, a developer and representatives from the business lines. Global Communities of Practice (CoPs) already were established within IM to align library sciences functions globally while still maintaining a local formal reporting structure. These communities have U.S. membership from Pfizer sites in Connecticut, Michigan,

California, New York and New Jersey and international membership from England, France and Japan.

The CoP leaders from Document Delivery, Serials and Electronic Resources were chosen to be part of the core business team representing Ann Arbor, Mich., Groton, Conn., and La Jolla, Calif., in the United States and Sandwich, England (Figure 1).

Midway through the project, the core team still was finding it difficult to obtain full commitment of all sites. The Serials CoP was the most affected business line, so additional participation was needed from this core group. Members from the Serials CoP in the larger R&D sites, Ann Arbor and Groton, were added

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## WITH BOTH FEET

Pfizer has endorsed a "revolutionary" approach to change over simple "evolution." Revolutionary change requires strong, clear directives from senior management that are reiterated throughout the effort. The effort should always be seen as mandatory for all members.

While revolutionary change requires a great deal of effort in promotion and support, the desired outcome occurs much sooner than evolutionary change.

REVOLUTIONARY CHANGE	EVOLUTIONARY CHANGE
Mandatory to Participants at Onset	Optional to Participants at Onset
Strong Directives From Senior Management to Implement Change	Directives From Senior Management to Guide Change
Harder to Promote	Easier to Promote
Requires Continuous Promotion for Acceptance	Requires Continuous Promotion to Maintain Momentum
Change Occurs Rapidly	Change Occurs Slowly

later in the project, as well as cross-functional representation from New York and New Jersey (Figure 2).

The core team and management sponsors defined project objectives and scope early and documented them in a statement of direction (SOD), which included the project details and anticipated timeline.

The SOD described the team members' roles and responsibilities; however, it lacked clear accountability for all deliverables. At the outset, all sites did not offer direction and buy-in, and while the production roll-out included all journal data, ongoing maintenance was neither smooth nor uniform. Two factors contributed to this issue:

**Sponsor Roles and Expectations.** The role of the management sponsor, who guides difficult issues and makes the final decision when consensus cannot be achieved, could have been more strongly defined. Strong management involvement in the project raises the importance of the effort for all team members and works to build a stronger team advocate for the change.

**Acceptance.** The Global Union List meant a significant change in daily activities for all team members. Some sites had to give up existing tools in favor of the single global tool, and many sites were faced with maintaining summary level data in two places.

In organizations attempting globalization, Pfizer's IM department has since found that revolutionary change is far more effective and timely to implement than evolutionary change (see chart, With Both Feet).

### Global Cooperation

When building a solid project team, there's no replacement for face-to-face meetings. Pfizer's only face-to-face meeting actually took place in a bar in Ann Arbor. Much of the team had just flown in from either California or England and were suffering from various forms of jet lag. Nonetheless, a two-hour casual in-person meeting allowed team members to know one another as people and not just as roles and helped to build relationships that were instrumental to the success of the project.

An early video conference kicked off the project, but teleconferences became the standard. This project was one of the first undertaken as a global organization. Many team members were still feeling their way through one- and two-hour

CORE PROJECT TEAM MEMBERS			
	Document Delivery CoP Leader—Groton	Serial Librarian CoP Leader—La Jolla	Electronic Resources CoP Leader—Sandwich
<b>Ann Arbor</b>	Document Delivery Colleague	Serials Colleague	Electronic Resources Colleague
<b>Groton</b>		Serials Colleague	Electronic Resources Colleague
<b>La Jolla</b>	Document Delivery Colleague		
<b>New York</b>	Management Representative	Serials Colleague	Electronic Resources Colleague
<b>Sandwich</b>	Management Representative	Management Representative	

ADJUNCT TEAM MEMBERS

**Figure 1.** Shown is the original Global Union List project team structure. Members of Pfizer's various communities of practice contributed to the effort.

CORE PROJECT TEAM MEMBERS						
	Document Delivery CoP Leader—Groton	Serial Librarian CoP Leader—La Jolla	Electronic Resources CoP Leader—Sandwich	Groton Serials Colleague	Ann Arbor Serials Colleague	New York Serials Colleague
<b>Ann Arbor</b>	Document Delivery Colleague		Electronic Resources Colleague			
<b>Groton</b>			Electronic Resources Colleague			
<b>La Jolla</b>	Document Delivery Colleague					
<b>New York</b>	Management Representative		Electronic Resources Colleague			
<b>Sandwich</b>	Management Representative	Management Representative				

ADJUNCT TEAM MEMBERS

**Figure 2.** Additional Serial CoP members were added to the final Global Union List project team. This yielded more direct participation in the defining, building and approval of the final product.

## TEAM TOOLS

While e-mail use and global distribution lists allow for instantaneous communication, global teams can quickly lose sight of a document trail and master document. At Pfizer, a document repository stores all project-related documents and tracks versions. A discussion list feature keeps the discussion threads cohesive.

During the Global Union List project, the team members found the discussion list cumbersome to maintain. The repository was just one more place for members to check for ongoing messages and discussions.

Because most members use e-mail to communicate with their CoP members, the repository discussion lists were abandoned. However, the team and project manager continued to use the repository to maintain multiple document revisions and history statistics.

teleconferences, which made for some very quiet meetings. How do you get a virtually connected project team communicating freely?

Building on the only medium available during teleconferences—sound—various electronic noisemakers were purchased for the core team. Team members were instructed to use them during the meetings to indicate their acceptance of ideas or to bleep someone who was droning on a bit too much. Because all the noisemakers sounded alike, one could act anonymously. This method broke the ice of the silent meetings, helped bring in a bit of levity to the dry project meetings and enabled the team to quickly open the lines of communication.

### History's Lessons

To aid decision-making, the Pfizer team took a page from the book *A Miracle in*

*Philadelphia* by Catherine Drinker Bowen. During the writing of the U.S. Constitution, each statesman at the Second Constitutional Congress in 1787 was given the standard single vote. Items could be brought up and voted on more than once. This allowed members to vote initially on what sounded good at the time, and upon careful reflection or research, could be addressed and voted upon again.

The Global Union List core team was small, all members held similar knowledge in the subject area, and each represented an equally significant line of the business. Each business representative was given one vote, and the project manager abstained from all voting. This gave the decision-making power to the business lines, clearly establishing the role of the project manager as facilitator. Voting was prompt and included input from a broad range of individuals.



While the multiple votes per item may sound more damaging to the timeline than a single definitive vote, this method worked very well for the core team. In reality, only a handful of items were voted upon more than once.

### **System Development**

Following the system development methodology, the team prototyped the Global Union List project early. Because a developer was on the team from the beginning, he gained a good understanding of the project needs to produce screen designs and flows and to set up the concept of iterative development with the team. The team visualized their requirements and came up with a positive development structure.

Once full development began, two-hour meetings were scheduled to review and discuss each aspect of the screens and their flows. The developer walked away with not only a list of changes and why they were needed, but very often a different method to provide the desired function. This two-way communication built a strong bond between the team and the developer, which provided an excellent support structure for the application both in development and post-implementation.

### **Production and Beyond**

The completed application was delivered to IM 10 months from inception. Shirts embroidered with the project name were shipped to the project team just before production rollout to herald the successful completion.

The Global Union List application has been adopted by other Pfizer sites since implementation and has continued to provide a single resource for the document delivery staff in sourcing their article requests. The Serials CoP continues to use this project to analyze and develop its collections.

Post implementation, the same developer supports the application, but a user group replaces the formal project team. Every member continues to have an equal voice in the continued development of the application. **PM**

**Helene S. Gidley** has more than 20 years of experience in numerous software- and hardware-related projects. Currently a project manager at Pfizer's Global Research & Development laboratory, Ann Arbor, Mich., USA, she plans to begin independent consulting in this field.