



“MeetingBooster has greatly improved the quality of our change management meetings. By drastically reducing the time we spend preparing pre-meeting material, in-meeting material, and post-meeting material. Simply put, I won’t run a meeting without MeetingBooster!”

- Scott Sax, Loyola University's Associate Director, PMO

## Loyola University of Maryland uses MeetingBooster to optimize Change Management Processes



### Scott Sax

Loyola University's Associate Director, PMO

### Company

Loyola University Maryland

### Industry

Higher Education

### Location

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### At-A-Glance

Loyola University Maryland is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideals of liberal education and the development of the whole person. Accordingly, the University will inspire students to learn, lead, and serve in a diverse and changing world.

### Background

Technology Services at Loyola University Maryland has implemented a comprehensive change management process for technology based projects. Changes to a project's scope, schedule, budget, resources, leadership and even project management discipline all get managed through change requests that are reviewed, approved and denied by a Change Advisory Board (CAB). The process for managing these change requests are all powered by Matchware's MeetingBooster ([www.meetingbooster.com](http://www.meetingbooster.com)).

### Challenge

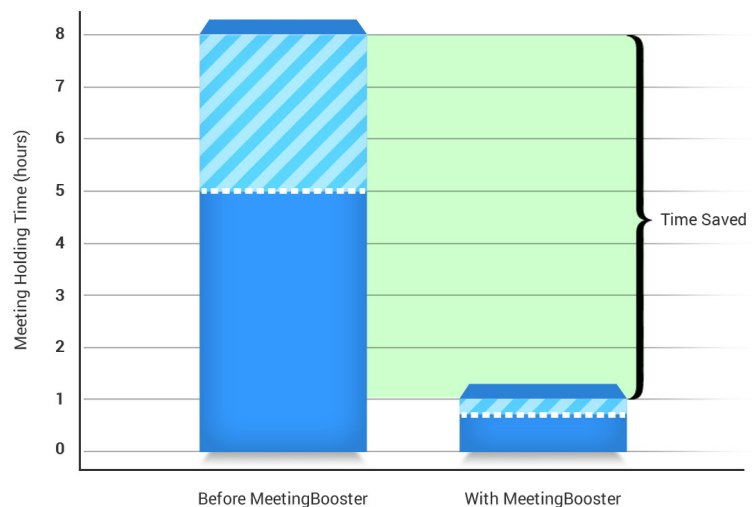
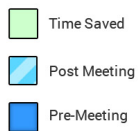
Project change requests are initiated through an electronic form that anyone in Technology Services can access. These changes can come in anytime, but the Change Advisory Board (CAB) meets every two weeks, so depending on when the changes are submitted determines when they are reviewed. The Assistant Director of the Project Management Office is responsible for overseeing the change management process. There is an extensive process to get ready for the project change review meetings, which includes preparing pre-meeting documentation, the in-meeting documentation, and the post-meeting report documentation. Before using MeetingBooster, the Assistant Director gathered all of the changes that were submitted from our online form that came in between the biweekly CAB meetings. For pre-meeting preparation, each change was saved to a Microsoft Word document that consisted of a multi-column table. This table included the change request information including links to the project in our Project Portfolio Management (PPM) system, links to the original change request, the category of the change (schedule, scope, budget, leadership, etc.), the project manager, and the requester. The pre-meeting document could take up to 3 hours to complete based on

the number of changes requested and location of all the information needed pertaining to the change. This pre-meeting documentation served as the agenda of the meeting as well, and needed to be out to the CAB members at least 48 hours in advance so that they could investigate the impact of any of the changes.

Many times however, changes would miss the 48 hour deadline and would be submitted last minute. This caused multiple emails to be sent out again and again with revised documentation to all of the members. As part of the in-meeting documentation, the Assistant Director created a PowerPoint presentation, transferring all of the information from the pre-meeting Word document into the PowerPoint. Although the PowerPoint presentation was template based, with the agenda and a structured approach to displaying the changes, all of the same information that was in the Word document had to be copy/pasted into it, with construction of the presentation still taking a couple of hours to create.

With an average of 10-15 changes per change period, only a few changes could fit onto a slide, causing the presentation to become fairly large at times. Because of the few changes that could fit onto a slide, the agenda and all of the changes were not visible at times so the meetings tended to go over or not all of the changes got reviewed. In-meeting documentation time could take up to 3 hours. Discussions could linger on more than they needed to when people weren't consistently reminded about the full agenda. Since the presentation had all of the same information from the pre-meeting Word document, all of the same links to the project and to the original changes were included. However, clicking on the links from the PowerPoint was unreliable and caused confusion and delay when there wasn't a seamless transition from the PowerPoint out to the project site and then back again in the meetings. After a change meeting was completed, a post-meeting report was created and emailed out to all the members within 24 hours. This report would update all of the change requests

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with the notes and decisions from the meeting. The post-report was very time consuming because it entailed cleaning up the notes from the meeting, transferring them where they were taken to the post report document template, capturing all the decisions and next actions for each change. In most cases, the post-report process would take up to 3 hours to complete. All in all, when the pre-meeting preparation, in-meeting preparation, and post-meeting preparation were completed, as well as the actual meeting itself, the hours involved could easily add up 8 hours, a full days' worth of work.

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## Solution

After Loyola adopted the use of MeetingBooster, the project change request meeting process became considerably easier to prepare for, participate in, and wrap up. The Assistant Director started using the template functionality within MeetingBooster. This made it very easy to create and set up the meeting. Everything that was done for the pre-meeting documentation was now done within MeetingBooster instead of a Word document. All of the same information was gathered, but this time it was put into the MeetingBooster agenda template, along with embedded links to the original changes and projects. The system generates a list of the changes and links automatically as part of the agenda so it is easy access for the CAB members to review. Depending on all of the changes that have been submitted, adding everything into the MeetingBooster meeting agenda template reduced the pre-meeting documentation from 3 hours to only a 30 minute to 1 hour task.

This is a remarkable time saver because that hour it takes to set up the pre-meeting document becomes the same documentation that is used for the in-meeting documentation and the post-meeting report documentation, reducing the time spent on this from 2 hours to 0. Not only that, but when changes come in last minute, they can immediately be updated in the agenda and CAB members are able to log into the system and review and see the updates without additional emails sent out by the Assistant Director. Updating the agenda is very easy to save and come back to finish, especially when the day can be filled with various interruptions.

During the change meetings, MeetingBooster is put up on the screen for everyone to see, with the agenda present on screen throughout the meeting. Roll call is taken using MeetingBooster, and then

with having the time estimates for each section of the agenda up on screen at all times really helps the meetings stay on track and get through all of the changes. People really seem to like the notebook layout/look and feel too. It is really easy to understand and follow during the meeting. Notes are being taken on the screen during the meeting as well, in real time. People are able to read the notes and

suggest changes to them or additions to them as they are being typed out. This has increased the involvement and participation of the people in the meeting. The decisions that were made on each change in the meeting are also very clearly visible when added into the meeting minutes.

At the end of the meeting, minor edits and clean-up is done to the notes that were taken during the meeting. The minutes are emailed to the members as a PDF right from MeetingBooster, which also includes all the original information and links that were added to the agenda. This almost instant sending of the minutes replaced the post-meeting report deliverable and time it took to create it. This reduced the post-meeting report documentation time from 3 hours to less than 15 minutes. Each project change management meeting was reduced from almost 8 hours, a full days work of preparation with the pre, during, and post meeting reports, down to about 1 hour of time to generate the same information.

“...Loyola has been very pleased with the use of MeetingBooster.”

### Conclusion

In conclusion, Loyola has been very pleased with the use of the MeetingBooster. Loyola has only scratched the surface of what the tool is capable of, and the project change management meeting is only one of several examples of how the tool has already saved time, created more productivity, more organization and effectiveness, and created better documentation for the organization.

