



## Viewpoint

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## Creating Accountability in Work and Resource Management

All organizations can improve. Everyone, regardless of the state of its current performance, can up its productivity and utilize its resources better. Each can do better in the timely completion of tasks that are essential for its daily work agenda and related business activities.

To improve performance in the completion of critical tasks, though, an organization must first methodically track those tasks – a non-trivial challenge. That’s because individuals vary widely in the management and processing of their regular daily or weekly tasks, and also because

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many tasks are not part of individuals’ regular work but nonetheless are critical for aligning to departmental and in many cases to corporate objectives. What’s more, many of these tasks involve outside parties such as customers, partners and vendors. In such instances the quality and timeliness of task management can impact those relationships as well and thus the revenue and operational effectiveness of an organization. Inadequate or lack of task management leaves most organizations lagging in productivity and frustrated in establishing accountability.

As is so often the case, the issue here typically is a failure to implement the right processes and technology to support task management in a proactive and committed manner. Over the past decade, our firm has seen this failure consistently undercut business potential, frustrating the leadership of almost every organization. The sizable investment organizations make in people — not to mention the products and customers the workforce support — means that they should be supported by applying a focused and technological

approach. Over the last year we at Ventana Research have been investigating this set of issues. We’ve created a business and technology category called work and resource management, and we have developed a systematic approach to help organizations prioritize tasks and optimize the resources assigned to enable their completion. An understanding of the importance of doing this is spreading widely within organizations.

Our work in this area yields one insight that stands above all others: The monitoring and streamlining of work activities must be tracked – and doing so using email or spreadsheets is inadequate. Spreadsheets are good for personal productivity but our research makes clear they are terrible for use in managing team- and business-level needs. In fact, it finds that fully 40 percent of organizations that use spreadsheets admit that the technology impedes effective management. If work is important enough to be assigned, accepted and completed, then using software not designed for this purpose and not effective at it does not make any sense.



Our approach to work and resource management emphasizes the importance of having a unified process to define, document and execute tasks using the most appropriate and most effective resources. This means adopting a formalized approach for even informal-seeming tasks. Developing such an approach should be straightforward, but unfortunately traditional project management software is too rigid and not designed for this set of needs. Newer task management software is good at creating and categorizing tasks, but has no way to ensure that individuals accept tasks and pursue them to completion. This leaves organizations in the situation of having no appropriate application to support the dynamic nature of work assignments, tasks and resources, and thus no reliable tool to confirm the assignment of responsibilities and deadlines.

Our benchmark research into next-generation business planning finds that almost half of all organizations (45%) lack accuracy in planning processes, and only 10 percent of organizations view themselves as performing work and resource management well. This means team dynamics must be about much more than just communications of tasks and deadlines, but must support the collaboration on the work; instead, there's a constant undercurrent of negotiation around accepting and prioritizing the tasks and the supporting decision-making and responsibility for them. In our view, every department in an organization — including marketing, sales, customer service, operations, finance and human resources — should provide managers with tools that digitally empower teams in the work that needs to be done.

Such an approach to work and resource management demands software that is designed to be dynamic and task-oriented. Just sending email messages and defining tasks in spreadsheets will not enable effective management and accountability. Email messages, spreadsheets and electronic messaging are neither effective nor efficient in ensuring that work is not just assigned but acknowledged and completed. Creating a culture of accountability and supporting a team- and outcomes-driven approach requires a centralized system for the creation and assignment of tasks and their tracking through to completion. This system should also provide a place where completed work is visible and acknowledged — the simple recognition of a task successfully completed that every worker appreciates.

We advise all organizations to examine how they create and assign work on an on-demand to daily and weekly basis. Are tasks centrally defined, assigned and tracked? Do managers know if the individuals involved have acknowledged and accepted the tasks for completion? Do those responsible know who on the various teams is getting these tasks completed? If you struggle to answer these questions or are not confident in what your organization is doing in work and resource management, it is time to consider a better path to enabling accountability and optimal productivity.



**Mark Smith – CEO and Chief Research Officer, Ventana Research**

Mark Smith, is the CEO and chief research officer of Ventana Research and drives the company's global research agenda. Mark is an expert in enterprise software and business technology innovations including the business areas of customer experience, sales and marketing. Mark covers the digital technology innovation areas of artificial intelligence, business analytics, big data, bots and natural language processing, collaboration, Internet of Things, mobile technology and wearable computing.