



<https://www.RefineM.com>

(417) 763-6762

[Contact@RefineM.com](mailto:Contact@RefineM.com)

### ***SUMMARY***

From June 2015 to July 2017, RefineM worked with Enactus United States, a nonprofit organization headquartered in Springfield, MO, on creating defined and repeatable project plan templates for the many events the organization hosts every year. Enactus faced several challenges, such as resourcing constraints, multiple simultaneous projects, and lack of documentation. RefineM worked with key stakeholders in the organization to set up project manager guidelines, provide training resources for these PMs, and create and revise project plans for their events.

### ***CHALLENGES***

The bulk of Enactus's challenges stemmed from outgoing experienced personnel and the lack of documentation of their expertise. Enactus's VP of Operations and Marketing/Communications was attempting to step in for the Event Manager, in addition to her primary job responsibilities, which created the potential for burnout and incomplete work. Enactus's president was also working to document the Event Manager's knowledge in Microsoft Project, but he was the primary person in the organization focused on this effort. Enactus was constantly in firefighting mode, reacting to emergencies as they arose and reinventing the wheel each time.

### ***SOLUTION***

RefineM worked with Enactus leadership to define project plans for each of their key events. The RefineM consultants asked the Enactus president and his direct reports to create a work breakdown structure by first defining high-level activities and then drilling down to the tasks and relevant details. RefineM then configured these details into Microsoft Project and refined it further to create a plan that would track progress towards the event on a weekly basis. At the end of the project, RefineM delivered a portfolio of all required tasks and tracked them on a weekly basis using the performance reporting template from RefineM's Essential Gear for Project Managers toolkit and a master file of projects collected into one Microsoft Project file.

### ***OUTCOME***

Enactus was very pleased with the project outcome and still uses the practices that RefineM defined. At the end of the engagement, RefineM transferred all project plans and reporting to the Enactus server and provided training on how to build project plan files in MS Project. This ensured that the Enactus staff were empowered to continue utilizing these strategies with future events. RefineM created and tracked over 40 project plans for Enactus; project duration ranged from one month to three years, and the budget for some larger events that RefineM managed exceeded \$1 million.

Enactus's VP of Operations and MarCom, Rachel Mobley, reported, "Now that we have systems in place to keep our projects organized and on track, it has greatly reduced the last-minute scramble."