

## Successful project management audit at a DAX company

The introduction of a uniform Group-wide process and cloud system solution for learning management - a complex and costly project of great strategic importance in all respects and with many stakeholders.

By preparing for an internal pilot audit, the HCM Consultant Group helped the client to assess the status and management of the project appropriately during the course of the project, to identify fields of action and measures, to identify potential for improvement and to optimally prepare for further internal and external audits.

### The task

Under the heading "Excellence in Learning", the implementation of a uniform learning strategy with a harmonized learning management process on a uniform cloud-based system platform was initiated for the customer. The associated project was part of a multi-year strategic corporate program for all HR processes.

In order to best prepare the learning management project team for the planned internal follow-up audits, the HCM Consultant Group was commissioned because of its expertise in this area to make the necessary preparations and to provide assistance in an initial internal audit.

### The pilot audit

The pilot audit for the Learning Management project (LM project for short) was carried out according to the usual timetable in the following phases:

- Initialization and preparation of the audit,
- Carrying out the audit,
- Reconciliation of results and audit report.

The processes described in the customer's own QM system and their specific characteristics carried out by the program formed the test basis for the scheduled audits. The following main topics were identified for the pilot audit:

- Project Management,
- Risk Management,
- Controlling,
- Change Management/Communication/Lessons Learned.

All participants rated the pilot audit for the LM project as successful. The summary of the audit report highlights:

- The project is impressively structured and follows the project instructions of the program,
- The auditors received a very good impression of the project management,
- The implementation of the programme rules is adequate and efficient.

In addition, the Decision Log used in the LM project attracted positive attention and was recommended as a template for use in other projects.

Following the express wish of the client, not only formalities were checked, but also possible improvement potential for the LM project itself was identified and discussed in the sense of a consulting audit, and appropriate measures were derived and documented.

In conclusion, the auditor confirmed that the audit was conducted in a very positive and constructive atmosphere, that the persons examined were well prepared, that all desired information could be provided immediately and that communication was characterised by cooperation, transparency and openness.

## **How HCM supported the customer during the pilot audit**

The HCM Consultant Group GmbH supported the customer from the beginning of the pilot audit and was able to contribute significantly to its success due to its relevant experience. The following consulting services were provided for the customer, among others:

### **Initialization and preparation of the audit**

- Description of the scope, objective and approach of the LM project,
- Presentation of the expectations of the contracting division and the auditors,
- Creation of a common understanding between all parties involved,
- Request documentation for the main topics identified,
- Coordination of appointments with contact persons.

### **Carrying out the audit**

- Structuring and inspection of the documents provided,
- Conducting interviews with project management and project management team,
- Clarification of questions and presentation of the "red thread",
- Presentation of the documents to the auditors.

### **Result reconciliation and audit report**

- Verification of the results with the LM project,
- Discussion of the auditor's report,
- Coordination and communication of measures.



## Added value for the customer

The pilot internal audit of the Learning Management project provided the following main benefits for the customer:

- Determination of project and project management status through objective external view,
- Valuable recommendations for action and advice on process optimisation,
- Improved positioning and acceptance of internal auditing,
- Gaining routine in dealing with processes and tools of audits,
- Greater willingness on the part of stakeholders to participate constructively in follow-up audits,
- Building trust with external auditors,
- Improved positioning of the LM project in the company (*project marketing*),
- Sample case of a large internal project with a very high percentage of changes.

With regard to further internal and external audits, the course and results of the pilot audit provided valuable information and templates for the entire program and other projects in the customer group.