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Jaak Jurison

Fordham University, jurison@fordham.edu

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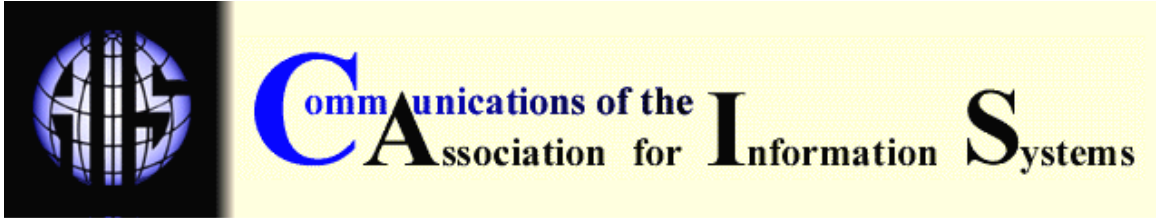
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INTEGRATING PROJECT MANAGEMENT AND CHANGE MANAGEMENT IN AN IS CURRICULUM

Jaak Jurison
 Graduate School of Business
 Fordham University
jurison@fordham.edu

ABSTRACT

Because many new information systems (IS) projects involve business process reengineering, project managers need the necessary skills to manage development projects and organizational change. These concepts are inter-related. The MIS 2000 curriculum calls for them to be taught as a single course. The purpose of this paper is review the fundamental principles of project management and change management and show how these concepts can be integrated and taught in this IS course. The paper first presents a broad overview of current project management and change management trends and practices and then provides guidance for developing an integrated IS project and change management course.

KEYWORDS: Project management, system implementation, organizational change

I. INTRODUCTION

Business firms are developing new information systems that help them redesign and transform their business processes. In essence, information systems are becoming powerful instruments for organizational change as evidenced by the widespread adoption of various types of enterprise-wide information systems. IS project managers are increasingly being held responsible not only for delivering technical systems, but also for organizational outcomes expected from the use of the system. As a result, the core competencies for IS project managers must change. While the traditional project management skills are still essential, the management of organizational change is becoming an equally important skill.

This new focus on change management is clearly recognized in the Model Curriculum for the Graduate Degree Programs in Information Systems [Gorgone et. al., 2000], which lists Project and Change Management as one of the core courses for an MS degree program in Information Systems. The goal of this course is "to reinforce the ideas of the organizational behavior course and make the relation between the technical and organizational aspects of projects more concrete for students, particularly those who come from technical backgrounds." (The course is described in Appendix A).

The objective of this paper is to describe the changing nature of project management, outline the key topics of modern IS project management, introduce the basic principles of organizational

change and change management techniques, and show how these topics can be integrated into a single graduate level IS course.

II. THE CHANGING ROLE OF PROJECT MANAGEMENT

Project management emerged over the years as a major new form of management to deal with the complexities of technology and knowledge-based teamwork in organizations facing rapidly changing business environments. The Project Management Institute [2000] defines it as "the application of knowledge, skills, tools, and techniques to project activities in order to meet project requirements." Project management is particularly important in information systems because most IS work is organized as projects.

The traditional purpose of project management is to provide focus for using resources to achieve a specific objective. The fundamental objective is to "get the job done," to reach the technical objectives within time, cost, and performance. These three variables are the critical project dimensions that are the main focus of traditional project management. Success is defined on a project manager's ability to meet budgets, schedules, and technical specifications.

It is widely recognized that project management must also focus on client satisfaction. The ultimate measure of project success is the client. If in the process of meeting the three critical dimensions, the manager or the project staff fails to satisfy the client, the project failed. A project can be considered a success only if the client, whether it is a group of internal users or a client in another company, is satisfied with the results.

In the current business environment, the project manager's responsibility is not only to assure that the system is delivered according to specifications, but also that the system performs well after it is delivered and the desired business objectives are achieved. Therefore, the traditional project life cycle, consisting of concept, planning, execution, and termination phases, is too limited and the life cycle concept must be extended to include operations and maintenance [Frame, 1994]. The measures of project success are now no longer based singularly on technical performance, but on IT-enabled operational changes in business processes and their impact on business results.

As an increasing number of new IS projects become more strategic in nature, they typically involve business process reengineering where organizational change is a huge part of a successful project. But even projects of smaller scope require some behavioral changes in order to improve organizational performance. Therefore management of organizational change is becoming an important and integral part of project management. This expansion of the concept does not mean that the traditional project management principles that served us well in the past are no longer important. The fundamental project management principles are still valid and needed. As senior management in many companies increasingly focuses on the bottom line, IS managers are under growing pressure to complete projects within budget and on time. The traditional project management tools and practices play a key role in helping project managers achieve these goals.

III. PROJECT MANAGEMENT FUNDAMENTALS

KEY TOPICS

A useful way to organize project management topics is to group them according to major activities in the project life cycle. This is the approach followed by most project management textbooks, as shown in Table 1.

Table 1. Conventional Project Management Course

Project Organization	<ul style="list-style-type: none"> • Project environment, stakeholders • Selection of the project manager • Project team design
Project Planning	<ul style="list-style-type: none"> • Scheduling • Cost estimating and budgeting • Risk assessment, contingency planning
Project Control	<ul style="list-style-type: none"> • Cost and schedule control • Technical performance and quality control • Change control
Project Leadership	<ul style="list-style-type: none"> • Communications • Motivation, team building • Conflict resolution

The same material can be organized along project management processes, as in the Project Management Body of Knowledge (PMBOK), defined by the Project Management Institute [2000]. The PMBOK covers nine different processes:

- Project Integration Management
- Project Quality Management
- Project Scope Management
- Project Human Resource Management
- Project Time Management
- Project Communications Management
- Project Cost Management
- Project Risk Management
- Project Procurement Management

This article takes the life cycle approach to these subjects. The purpose is to focus only on key areas of project management topics with special relevance to managing the implementation process which should be given adequate attention in a project and change management course. A detailed treatment of IS project management, written from a managerial rather than from a technical point of view was presented previously in this journal [Jurison, 1999].

PROJECT ORGANIZATION

With the broadened project scope of encompassing system implementation, it is important for students to understand the overall organizational context and environment in which the project exists. A major part of the project environment is project stakeholders. Stakeholders are individuals or groups that stand to gain or lose from the outcome of the project. Different stakeholders have different agendas and priorities. It is important for project managers to know the key stakeholders, their motivations, and their ability to influence the project outcome. A systematic stakeholder analysis is part of a project manager's toolkit. It can provide an understanding of stakeholder concerns and provide the basis for developing strategies for dealing effectively with different stakeholder groups. Project managers must learn how to avoid organizational problems and pitfalls and be actively engaged in managing the relationships with key stakeholder groups. When projects include organizational change, stakeholder relationships become particularly important and warrant special attention in project management education.

Probably the most important organizational decision is the selection of the project manager because this decision has an enormous impact on the project's success. Typically this selection is based on finding a person with a mix of the following attributes and skills:

- Communication
- Organization
- Teambuilding

- Leadership
- Negotiation
- Goal orientation
- Ability to work under pressure
- Technical competence

While managerial and interpersonal skills were always considered more important than technical proficiency, these skills become even more critical for managing projects where significant organizational change is necessary. If a project manager is held responsible for delivering business results, he or she must also be familiar with the various business processes involved and understand how IT creates business value. In other words, how the project contributes to the bottom line.

Selecting team members and structuring the team is also important. It involves getting the best people and the right people on your team. An effective mix of people on the team consists of system designers, developers, users, and various support people. Whenever the project involves major organizational changes, it is particularly important to put the users on the team early to get their business perspective and gain their commitment.

PROJECT PLANNING

Traditional project planning tools and processes are covered reasonably well in traditional project management texts. However, two topics that need special emphasis are:

- (a) the participation of the user organization in the planning process and
- (b) risk analysis.

User participation is essential to get the requirements properly defined and to arrive at a realistic plan, but more importantly, to gain user acceptance and commitment to the project. A large percentage of technically sound systems fail to deliver benefits because users were not sufficiently involved in the planning process. For example, Markus and Keil [1994] present a case study of an expert system for sales reps that remained mostly unused because the reps were not involved in the design and were reluctant to use it. Their paper explains why users need to be part of the planning and design phases of a project.

Risk assessment, an important component of project planning, traditionally focused on technical and managerial issues associated with software development. It is important for students to understand that, in addition to the traditional sources of risk in the development phase, new sources of risk are present in the implementation phase of a project. Therefore it is imperative that both sources of risk be considered jointly in the planning phase of a project [Markus 2000].

An excellent generic list of major risks is developed by Schmidt et. al. [2001]. Their comprehensive list of 53 risk factors can serve as point of departure for developing a project-specific risk list. A ranked list of top 11 risk factors is shown in Table 2

Table 2. Top Ranked List of Project Risks [Schmidt et. al. 2001]

Rank	Risk Items
1	Lack of top management commitment to the project
2	Failure to gain user commitment
3	Misunderstanding the requirements
4	Lack of adequate user involvement
5	Lack of required knowledge/skills in the project personnel
6	Lack of frozen requirements
7	Changing scope/objectives
8	Introduction of new technology
9	Failure to manage end-user expectations
10	Insufficient/inappropriate staffing
11	Conflict between user departments

PROJECT CONTROL

Project control involves comparing progress with the plan and taking corrective action when needed. To do so requires systematic monitoring of cost, schedule, and technical performance. Traditional project control techniques and tools are extensively covered in numerous project management textbooks and taught in current project management courses. Additional emphasis should be given to the use of earned value, a powerful technique for tracking cost and schedule in an integrated manner. With the use of commercial project management software, earned value calculations are relatively simple, provided the budget and detailed schedules are well planned and defined.

Two other essential control topics are quality control and configuration or change control. Change control is of particular importance for IS project managers because many project failures can be traced to "scope creep" caused by poorly controlled changes made well beyond the requirements definition phase.

PROJECT LEADERSHIP

Leadership is generally considered the principal role project managers are expected to play. Major topics under project leadership are communication, motivation and team building, and conflict resolution. When project managers are held responsible for system implementation and business improvements from a new system, these leadership issues take on added significance and require special attention in project management textbooks and courses. By and large, leadership issues are inadequately covered in most IS project management textbooks.

IV. IS IMPLEMENTATION AND CHANGE MANAGEMENT

A major challenge for which many project managers are ill prepared is the implementation phase of an information system. Implementation research suggests that the most critical problems are not technical, but are related to organizational and managerial issues in the implementation process. McKearsie and Walton [1991] define IT implementation as a set of three subtasks:

- Designing the IT system and organization that will operate it
- Developing enabling human resources policies
- Managing the implementation process

They conclude that the full potential of IT can only be realized if its implementation is accompanied with appropriate changes in the organization, business processes, and human resource practices. One of the key features of IT is its ability to integrate various business functions, crossing organizational boundaries, changing perceptions of power and status, and the way people work. People often view new systems as a threat to their established positions and interests. New IT requires people at all levels in the organization to change their behavior significantly. Such a change can lead to resistance if the system implementation is poorly managed. In short, effective IS implementation is a task of managing change.

PROJECT MANAGER AS AN AGENT OF CHANGE

Because change management issues are largely behavioral and organizational, many managers who have advanced to project management positions through a technical career path are not well prepared to deal with change. To be effective, they must be aware of the people and organizations that are affected by the potential change in the work patterns, power balance, culture, and conflicts of interest. Project managers must also understand the basic theories of change management and be able to apply them in a business setting. In effect, project managers must become agents of change. In broad terms, change agents identify the need for change, establish the direction for constructive change, and make change happen.

To bring about IT-enabled organizational change, project managers must understand the strengths and limitations of IS professionals as agents of change. Past implementation failures and excessive technical focus have eroded IS credibility in many organization [Bashein and Markus, 1997]. IS managers can be more effective as change agents if they know that they can

play different roles in change efforts and understand how these roles can influence their credibility and implementation success.

Markus and Benjamin [1996] describe three different "ideal" models of change agency: the traditional IS change agent, the facilitator, and the advocate. The traditional change agent views the technology as the agent of change and the IS organization has no change responsibility beyond building technology. The facilitator's view is that people (clients) create change and the role of IS is that of a facilitator who only helps clients to achieve results, but is not held responsible for changes in organizational performance. In the advocate role, IS works to influence people's behavior in directions that the change agents consider desirable, whether or not the change "targets" themselves hold such views. To be successful, IS specialists need to be familiar with and behaviorally skilled in all three roles and be able to shift rapidly from one model to another depending on the particular situation.

THEORETICAL FOUNDATIONS OF ORGANIZATIONAL CHANGE

The fundamental concepts in organizational change that are relevant to IS implementation are:

- Models of social change
- Organizational alignment model
- Resistance theories
- Innovation diffusion theory

Social Change Models

The Lewin-Schein three-stage model of social change is the most widely used framework for describing IT-enabled organizational change. The first stage, unfreezing, creates a climate for change. The next stage is change - this is the phase where the system is introduced and change takes place. In the final stage, refreeze, the system is institutionalized [Lewin, 1947]. Another model used in IS research is the Kolb and Frohman [1970] model of the consulting process. It is essentially an extension of the Lewin-Schein model, describing the organizational change process in terms of seven stages that map directly into the Lewin-Schein model. These seven stages are:

1. Scouting
2. Entry
3. Diagnosis
4. Planning
5. Action
6. Evaluation
7. Termination

Organizational Alignment Model

The fundamental concept in the organizational alignment model is that effective implementation requires alignment of the technology and the organization. All basic components of an organization, strategy, structure, management processes, and individuals and their roles, are interrelated and must be brought into alignment with the new technology to realize the full potential of a new system [McKersie and Walton, 1991; Benjamin and Levinson, 1993; Luftman et. al., 1999].

Resistance Theories

Resistance theories deal with resistance to new systems and their causes. Keen [1981] argues that IT development is not only a technical, but also an intensely political process. This duality leads to "social inertia," which states that "no matter how hard you try, nothing seems to happen." [Keen, 1981]. He describes various forms of counter-implementation, a deliberate effort to thwart the implementation, which may include such tactics as delaying, complicating, and withholding resources. The appropriate approach to overcoming resistance depends on the situation and the underlying cause for resistance.

Markus [1983] developed three basic theories of the causes of resistance:

- people-determined,
- system determined, and
- interaction theory.

The people-determined theory is based on the assumption that people resist systems because of factors internal to the person or group. The system-determined theory holds that people resist because of factors in the application or system being implemented. The interaction theory assumes that people resist new systems because of an interaction between characteristics related to both people and systems. Each theory calls for a different implementation strategy. The people-determined theory suggests replacing or co-opting those who resist. The system-determined theory predicts that fixing technical problems would eliminate resistance. The interaction theory does not offer tactics that are universally applicable to every situation. However, it suggests conducting a thorough analysis of all factors that might facilitate or hinder the change and making appropriate organizational changes before the system is implemented. These changes may range from simply restructuring incentives for users to a restructuring of the complete organization.

Innovation Diffusion Theory

Innovation diffusion theory [Rogers, 1983] is appropriate for systems that cannot be mandated by management but must be adopted on a voluntary basis by those who use them. The major components of the theory are:

- S-shaped growth pattern
- Innovativeness and adopter categories
- Individual adoption process
- Perceptual characteristics of the innovation
- Diffusion networks and opinion leaders

The fundamental element of the theory is that the growth pattern of new innovations is characterized by an s-shaped curve and the number of individuals adopting per period of time follows a normal bell-shaped curve. Another major component of the theory is the concept of innovativeness and adopter categories. Five categories are identified based on their relative innovativeness:

- innovators,
- early adopter,
- early majority,
- late majority, and
- laggards.

Understanding the differences among the adopter types is useful for identifying change agents or champions for new systems. The individual adoption process suggests that it is not an instantaneous act, but a process that takes place over time in five stages: knowledge, persuasion, decision, implementation, and confirmation.

The characteristics of the innovation itself, as perceived by potential adopters, are important because they affect the speed at which adoption takes place. There are five distinct attributes:

- Relative advantage - the degree to which an innovation is perceived as better than the idea it supersedes.
- Compatibility - the degree to which an innovation is perceived as being consistent with the existing values, past experiences, and needs of potential adopters.
- Complexity - the degree to which an innovation is perceived as difficult to understand and use.
- Trialability - the degree to which an innovation may be experimented with on a limited basis.
- Observability - the degree to which the results of an innovation are visible to others.

In general, the rate of adoption is positively related to perceived relative advantage, compatibility, trialability, and observability, and is negatively related to perceived complexity of the innovation.

The last component of innovation diffusion theory is focused on how diffusion networks and opinion leaders facilitate the diffusion process.

V. INTEGRATING PROJECT MANAGEMENT AND CHANGE MANAGEMENT

The primary focus of an IS project and change management course still has to have a strong focus on project management principles: organizing, planning, scheduling, budgeting, monitoring and controlling. The control aspect should encompass not only schedules and budgets, but also configuration and quality control, which should be given equal consideration

The students need to understand the different roles the IS professional can play in organizational change and be able to adopt a role that is appropriate for a specific circumstance.

The role of the user over the system life cycle and change management issues needs to be integrated throughout the course. In fact, the whole development process can be treated as a planned organizational change. The role and importance of key stakeholders, which has grown more central in recent project management literature, should be introduced early and reinforced throughout the course. The need for an influential project champion, prototyping and piloting to determine user needs, and getting early feedback are other important topics that warrant strong emphasis.

CASE STUDIES

The most effective method of teaching these concepts is through the use of case studies. A number of cases are available from the Harvard Business School on IS project management as well as on change management. Shorter cases can be found either on-line or in print form in professional journals (such as *CIO* and *Computerworld*). A number of case studies are cited in Appendix B.

SPECIAL TOPICS

Depending on needs of the students, several additional special topics can be incorporated in the course, including management of multiple projects, managing outsourced projects, and global software projects. Management of multiple projects became increasingly important in recent years. Rather than authorize very large and complex projects which are inherently risky, many firms reduce risk by breaking these projects into smaller incrementally funded projects. As a result, future IS managers will manage a larger number of small and medium-size projects with many interdependencies. Students need to learn how to plan and manage multiple projects effectively.

Another trend is toward outsourcing various IS functions to a vendor or a team of vendors. To manage these projects effectively, project managers need additional knowledge and skills. Students should be able to understand the issues in managing these projects, both from the vendor's and the client's perspective. They may wind up on both sides during their careers.

Many projects are carried out by global cross-cultural teams, often distributed across many locations across the world. This means working across country borders and time zones. Managing such global teams requires special skills, understanding of cultural differences, and managing virtual teams. In addition, the implementation will take place in many culturally different countries. Cultural diversity adds another challenge to project managers: how to plan and manage organizational change across multiple sites and national cultures.

While any one of these topics is worthy of comprehensive treatment, it is not practical to treat them in any depth in this course. However, the students should be at least made aware of the key issues in each of these topics.

TEXTBOOK SUPPORT

Several textbooks are available for the conventional project management part of the course. For someone who would like to follow the Project Management Body of Knowledge (PMBOK) approach, the latest edition of Schwalbe [2002] may be appropriate. A wide variety of textbooks are available for a course organized according to the life cycle. In recent years I have

been quite successfully using two books in my course for MBA students: a general project management text [Frame 1995], complemented with a software project management text [Bennatan 2000]. A detailed list of textbooks is included in Appendix B.

One limitation of all project management texts is that they do not cover implementation and organizational change. Thus, no suitable text is available for this portion of the course as of the end of 2001. The topics could be supported by articles from various academic journals and professional magazines. A list of readings on implementation and organizational change is also provided in Appendix B.

COMPUTER TOOLS

It is important that the students also learn to use commercially available software tools designed to support project management. Among the many tools available on the market, Microsoft Project is currently the most widely used. It is reasonably priced, relatively easy to master, and is supported by a number of instruction manuals from various publishers. Microsoft offers discounted academic licenses for classroom use.

TEAM PROJECTS

Team-based projects offer excellent opportunities for practical experience and reinforce the project management principles throughout the course. While it is not practical in a 10 to 14 week course for student teams to work on a complete development project from the beginning to completion of deliverables, it is possible to assign projects that give students some insight to what goes on in a typical software project. In my courses students develop a complete detailed project plan for a hypothetical project using Microsoft Project for developing schedules and budgets and allocating resources. At the end of the course, each team presents the plan to the class which acts as a senior management review team. In a Project and Change Management Course the plan can be extended to include the implementation phase. The teams can be given also case studies to analyze a variety of large-scale organizational changes. A broad outline of a syllabus for a 15-week course is given in Appendix C.

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APPENDIX A. MSIS2000.4 PROJECT AND CHANGE MANAGEMENT

CATALOG

Managing projects within an organizational context, including the processes related to initiating, planning, executing, controlling, reporting, and closing a project. Project integration, scope, time, cost, quality control, and risk management. Managing the changes in organizations resulting from introducing or revising information systems. Identifying project champions, working with user teams, training, and documentation. The change management role of the IS specialist.

PREREQUISITES AND/OR COREQUISITES:

MSIS2000.1, MSIS2000.2 AND MSIS2000.3

OBJECTIVES

Students develop detailed project plans, schedules, and budgets; estimate project resources; allocate/coordinate resources; and interface with management. They are expected to learn tools and techniques of project planning and management, including the use of project management software. The course develops skills in the human and organizational implications of change including understanding the organizational change process; identifying stakeholders; assessing potential impacts of projects; and overcoming resistance, politics, and other human issues.

TOPICS

- Project lifecycle
- Project stakeholders
- Project management skills (leading, communicating, negotiating, influencing, and presenting)
- Change control (scope, schedule, cost, quality, risk, project team, and senior management)
- Project planning (definition, scope, schedule, costs, quality, resources, and risks)
- Contingency planning
- Project reporting and controls (definition, scope, schedule, costs, quality, resources, and risks)
- The role of IT in organizational change
- The role of IS specialists as change agents
- Envision change and the change process
- Diagnose and conceptualize change
- Deal with the challenges of implementation and understand and cope with resistance
- Deal with issues of motivation, interpersonal relations, group/team dynamics, and leadership in the change process.
- Manage organizational politics
- The limitations of projects as organizational change initiatives
- Organizational influences on project success (culture, organizational structure, rewards, and measures)

- Additional activities required to ensure the success of IT projects (training, job redesign, communication, etc.)
- Hands-on experience using project management software (e.g., Microsoft Project)

DISCUSSION

Context of the course in the total curriculum: This course introduces two major, related topics into the required portion of the MS program: project management and change management. MS degree holders in information systems will inevitably be involved in the management of IS projects and, as a result, in the management of the changes that projects introduce. This course is fundamental to almost all career tracks and essential for students who undertake a practicum.

Philosophy underlying the selection of topics: Most information systems work is organized as a project rather than being department or function oriented. Therefore, it is essential for IS specialists to know how to manage projects effectively. But good project management alone is not sufficient to ensure organizational success with information systems. Work in this environment is a series of projects, which are conceived, staffed completed, and shut down.

Although IS projects are among the most challenging, being able to plan and manage any business project is an increasingly important and marketable skill. This course examines the roles, responsibilities, tools, and techniques for effective project management. A blend of theory and practice, the course addresses project organization, project planning, project execution, and project control. The topics in project management were selected from the Project Management Institute's "Project Management Body of Knowledge." *PMI's Guide to the Project Management Body of Knowledge* can be downloaded from www.pmi.org.

Research shows that projects are a rather risky (i.e., failure-prone) way of attempting to create organizational change. Therefore, IS specialists must understand and be able to apply alternative ways of bringing about organizational change, such as dealing with organizational politics and designing systems that are culturally compatible. Further, organizational success with information systems usually requires the fulfillment of activities that are not always performed by IS specialists, such as job retraining and the development of new measurement and reward systems. IS specialists must understand what needs to get done and how to work with other specialists to ensure that these essential tasks are completed.

One way to frame the course is to look at project and change management as the integration of technical, cultural, and political dynamics and interactions, drawing out more explicitly the critical role of broader human, cultural, and political factors in the change process.

APPENDIX B: PROJECT AND CHANGE MANAGEMENT REFERENCES AND RESOURCES

SOFTWARE PROJECT MANAGEMENT

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APPENDIX C. GENERIC SYLLABUS FOR IS PROJECT AND CHANGE MANAGEMENT COURSE

Week	Topics
1.	IS project management process, Capability Maturity Model (CMM)
2.	Project environment and organization: Project office, stakeholders
3.	Project planning: Specifications, work breakdown, estimating
4.	Project planning: Scheduling, risk assessment, standards
5.	Project manager, team selection and organization
6.	Project control: Budget and schedule control, Earned Value Analysis
7.	Project control: Project reviews, metrics
8.	Controlling changes and managing quality
9.	Project leadership: Team building, communication, conflict resolution
10.	System implementation, IS role in change management
11.	Organizational change theories

12. Best practices of organizational change
13. Special Topics: Multi-project management, outsourced projects
14. Team project presentations

ABOUT THE AUTHOR

Jaak Jurison is Associate Professor and Area Chair for Information and Communications Systems at the Graduate School of Business, Fordham University. He received his MBA degree and PhD from The Peter F. Drucker Graduate School of Management, Claremont Graduate University. His BSEE and MSEE are from Worcester Polytechnic Institute and Columbia University, respectively. Prior to entering academia, he was a manager with Rockwell International Corporation where, most recently, he was program manager for a large multinational system development program for Australia.

Dr. Jurison's research interests include integration of business and technology, evaluation of information technology benefits, and international information technology issues. He is the author of numerous papers and co-editor of two books: *Productivity in the Office and the Factory* and *Information Systems in a Global Business Environment*. He serves on the editorial review boards of *Communications of AIS*, *Journal of Global Information Management* and *Journal of Global Information Technology Management*.

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