FROM SILOS TO SYNERGY



SOUTHERN ILLINOIS UNIVERSITY
EDWARDSVILLE

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FROM SILOS TO SYNERGY

The Shift from PMIS to Collaborative Work Management



Jeff Manning
Project Portfolio Mgmt. Lead
Bayer Crop Science

SOUTHERN ILLINOIS UNIVERSITY
EDWARDSVILLE


PROJECT AETHER: Status Update
Bar Chart
Budget
PROJECT AETHER: Mid-Point Update
STATUS: ON TRACK (Green)
Phase 2 (Mid-Point)
Completion: 80% (12/20 tasks)
Budget: Under (78% Expended)
PROJECT AETHER: Status Update
• Current Phase: Phase 2 (Mid-Point)
• Overall: ON TRACK (Green)
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SILOS

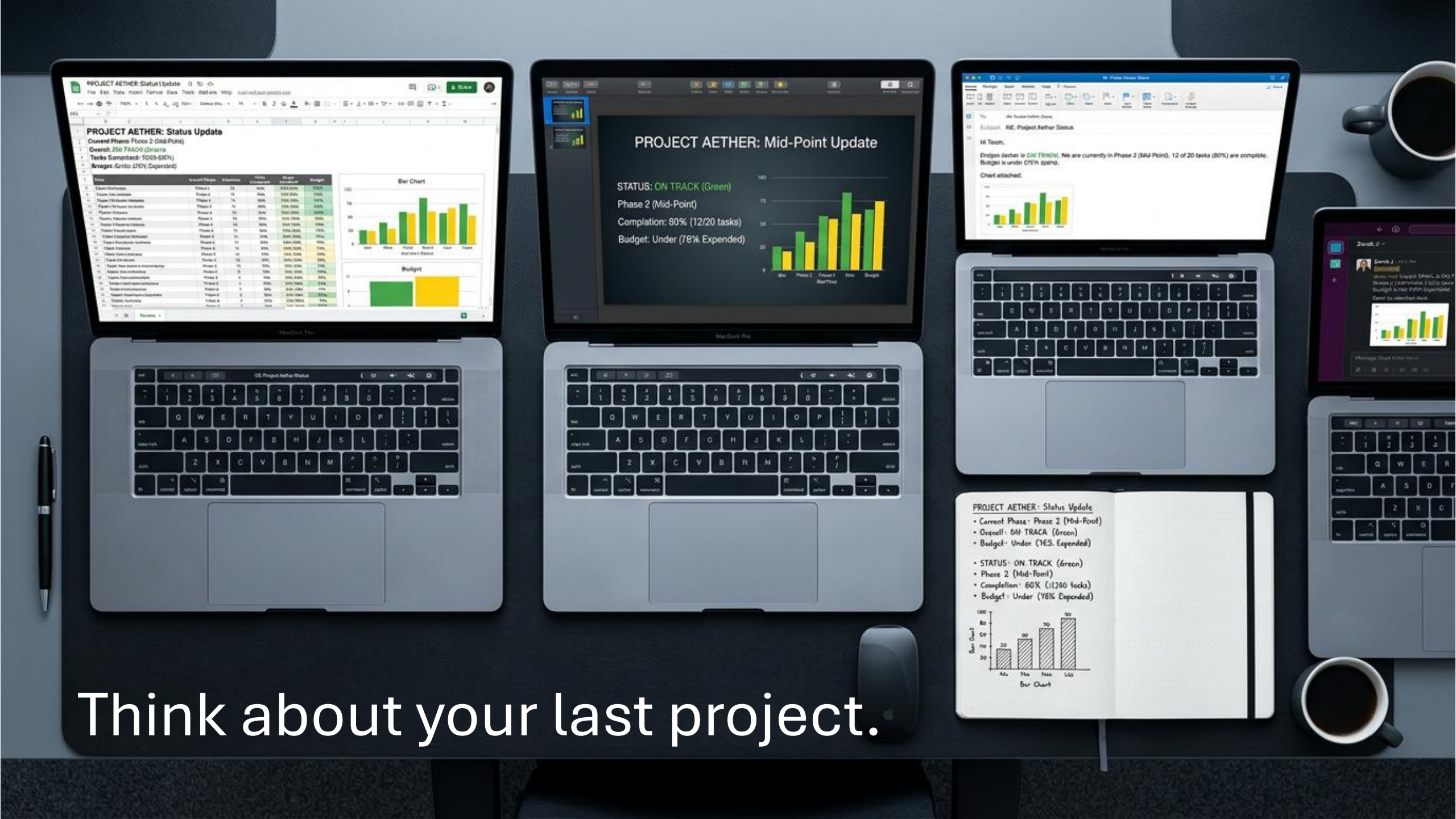
1. Why shift from PMIS to CWM is happening

2. How CWM can help break down silos

3. How Collaborative practices can help scale project and portfolio management across an organization

The Hidden Cost of Disconnected Work




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Bar Chart
Think about your last project.

PMIS vs. CWM

PMIS

Project Management Information System

- A structured system to plan, execute, monitor and control projects
- Built around the project manager
- Think Microsoft Project or Primavera

CWM

Collaborative Work Management

- Task-driven workspaces where people plan, coordinate and automate their work
- Built for the people doing, sponsoring and affected by the work
- Planning, collaboration, automation and reporting on one platform

Not “PMIS is dead.” Critical path, earned value and resource capacity still matter. CWM connects the people doing the work to the plan.

CWM definition: Gartner

Visibility has always been the job

Manual

Whiteboards to Gantt charts

- Whiteboards, checklists, Gantt charts, critical path
- Visibility built by hand, with manual reporting

PMIS

Microsoft Project, Primavera

- Structure and control
- One department, one plan, one PM's file folder

CWM

Collaborative Work Management

- Everyone can see, understand and act
- Planning, collaboration and reporting together

Then the environment changed: data, teams and tools became distributed, user-experience expectations rose, and leaders wanted faster insight.

The tools changed; the need didn't. CWM asks a bigger question: can everyone see, understand and act on the work together?

From managing the plan to managing the flow of work.
From reporting status to creating shared visibility.
From assigning tasks to enabling collaborative accountability



Control the plan

Share the plan

Act on the plan together

The Shift: From Control to Connection

What is the timeline?
What is the budget?
What is the critical path?
What tasks are complete?



Control the plan

Share the plan

Act on the plan together

The Shift: From Control to Connection

Who is blocked?
Where are decisions waiting?
Which teams are dependent on one another?
What information is being recreated manually?
What work is invisible until it becomes urgent?
Where are people spending time managing the process instead of advancing the outcome?



Control the plan

Share the plan

Act on the plan together

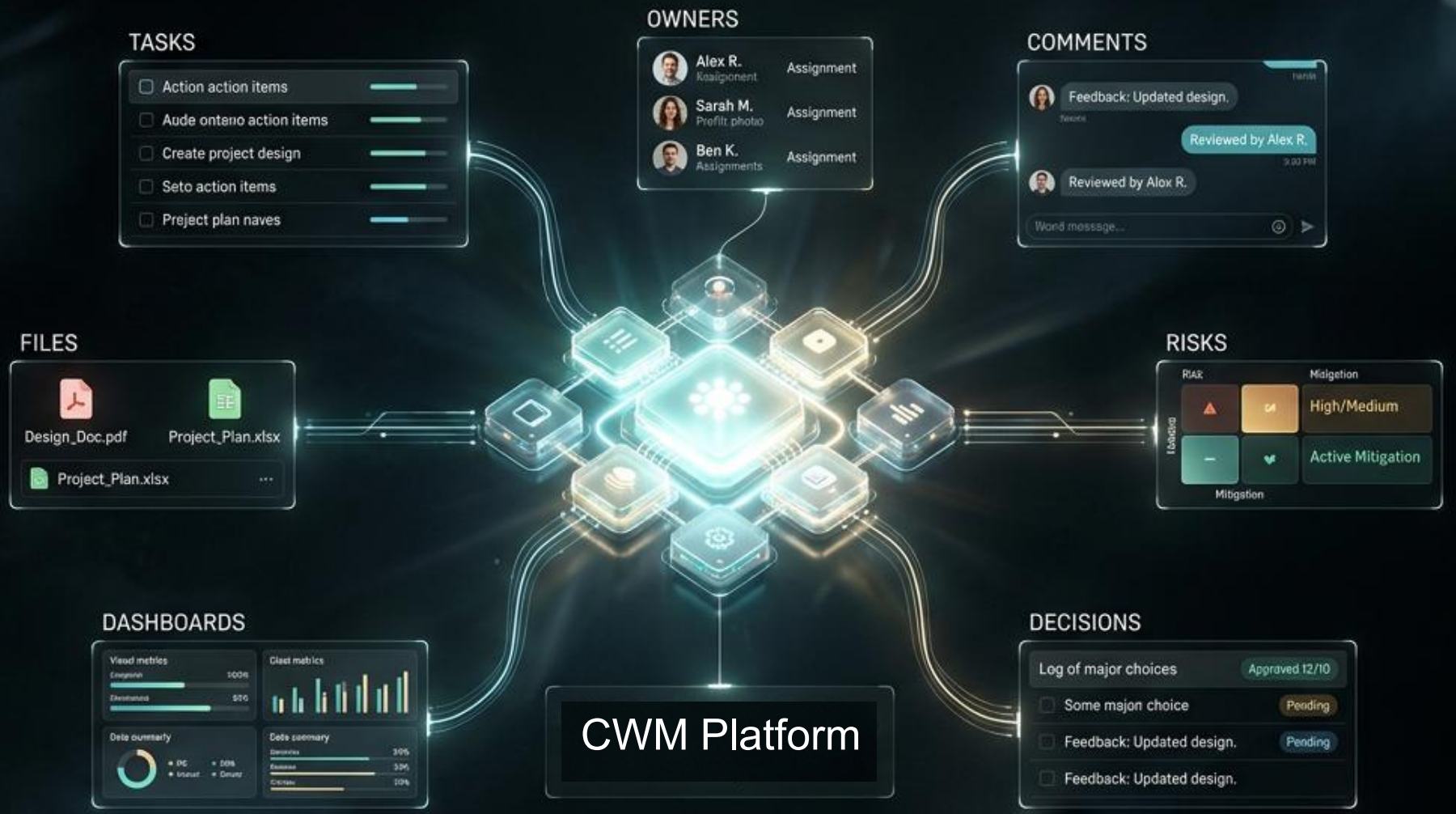
The Shift: From Control to Connection



PMIS helped project managers manage projects.
CWM helps entire organizations manage how work happens.


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RE: Project Aether Status
Hi Team,
Chart attached.
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Bar Chart
SILOS are not always organizational charts

The Opportunity: A Shared Operating System for Work



PMI's project success research describes success as more than schedule, budget and scope. It’s also about value, outcomes, stakeholder alignment. If success is about outcomes, we need visibility into the work that creates them.

DEMO

I’m going to show you five moments where disconnected work usually breaks down — and what changes when the work is visible.

Demo moment	Pain	Behavior change
Intake	Requests arrive everywhere	Work enters consistently
Ownership	Nobody knows who has what	Accountability is visible
Risks	Issues surface too late	Blockers appear earlier
Reporting	PMs rebuild status manually	Leaders see decision-ready information
Automation	PMs chase updates	The system handles routine coordination



Smartsheet, monday.com and Asana lead the CWM market

Gartner Magic Quadrant, Sept 2025

Evaluated on ability to execute and completeness of vision

Leaders sit in the top-right quadrant: strongest on both measures.

Smartsheet is one example; these behaviors apply to many CWM platforms.

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INTAKE:

FROM INFORMAL REQUESTS TO A VISIBLE DECISION QUEUE



PAIN:
Requests arrive everywhere

Behavior to change: Work enters consistently
People submit work through **one agreed front door**, and the portfolio team evaluates requests consistently before work begins

Instead of:	Email →	PM →	Spreadsheet →	Teams message →	Another PM →	Meeting
You get:	**Request** →	**Standardized intake** →	**Triage** →	**Prioritization** →	**Owner** →	**Execution**

Make the better path the easy one. Instead of “Don’t email us,” give people an easier alternative: “If you need something, submit it here.”

The change isn’t the form — it’s moving from informal demand to intentional demand.

Keep the form simple. Too many questions and requesters will resist; adoption comes first, and you can add detail during triage.

NOTE: PMI identifies demand management, standardized processes and consistent assessment/prioritization as key portfolio-management practices.

OWNERSHIP:

FROM “SOMEONE WILL HANDLE IT” TO NAMED ACCOUNTABILITY

Pain

Nobody knows who has what.

Behavior to change: accountability is visible

Every initiative, deliverable, action, decision and material risk needs a **named accountable owner**. Contributors can be many; accountability should be singular and visible.

Instead of asking: “Who’s working on this?” → **Owner** | **Commitment** | **Due date** | **Status**

The rule: “No important work without an owner, and no owner without a commitment.”

The goal is not surveillance. It is to eliminate ambiguity.

How CWM reinforces the behavior

Accountable owner

Contact columns identify the accountable owner.

Clear roles

Separate fields clarify the owner, approver, contributors and sponsor.

Traceable commitment

Due dates, comments, attachments and update requests create a traceable commitment.

Exceptions exposed

Reports expose unassigned, overdue or awaiting-decision work.

NOTE: PMI portfolio and project-management standards emphasize governance, defined responsibilities, and clear authority for effective decision-making.

RISKS:

FROM A KICKOFF CHECKLIST TO LIVE, OWNED ACTION

Pain

Issues surface too late.

Behavior to change: risk is a continuing discipline

Not a one-time workshop. Every significant risk needs an **owner, response, trigger, review date and escalation route**.

How CWM reinforces the behavior

Risk register

A configurable sheet captures cause, event, effect, rating, owner, response, trigger and next review date.

Right audience

Reports bring high-exposure, overdue or imminent risks to the right audience.

Early prompts

Automated reminders and escalation workflows prompt owners before review dates or thresholds are breached.

Visible trends

Dashboards make material risk trends visible alongside delivery status.

Demo steps

1. **Open the risk register**
2. **Filter for high risks, overdue reviews or approaching triggers**
3. **Show the named owner and mitigation action**
4. **Show the leadership-facing risk report or dashboard**

NOTE: The Association for Project Management describes risk management as ongoing and notes that risk registers should record analysis, response actions, and ownership. PMI's risk-management standard provides the framework for identifying, assessing, responding to, and monitoring risk.

REPORTING:

FROM REBUILDING STATUS TO DECISION-READY INFORMATION

Pain
PMs rebuild status manually.

Behavior to change: update once at the source
Reports and dashboards turn that source data into **decision-ready views** for each audience.

Today	Team members	→	PM	→	Spreadsheets	→	PowerPoint	→	Leadership
Desired	**Update the work where the work lives**	→	**CWM reports & dashboards**	→	**Leadership views**				

How CWM reinforces the behavior

Source sheets
Work stays in source sheets rather than being re-entered into decks or separate trackers.

Reports
Reports filter and combine information from the relevant workstreams.

Dashboards
Dashboards summarize portfolio health, milestone status, risks, blockers and decisions needed.

Visible freshness
“Last updated” and owner fields make data freshness and stewardship visible.

One source, four views

Team member
What do I need to do?

Project manager
What requires attention?

Portfolio manager
Which projects are off track?

Executive
Where do I need to make a decision?

NOTE: PMI guidance on project communication emphasizes identifying stakeholder information needs and tailoring status information to support those needs. CWM reports and dashboards are designed to present configured source information in filtered and summarized views.

AUTOMATION:

FROM PM CHASING TO OWNER-LED UPDATES AND EXCEPTION HANDLING

Pain

PMs chase updates.

Behavior change: the system handles routine coordination

Automate administrative friction, not judgment. People stay accountable; the system remembers that an update is needed.

Rules do the chasing: trigger → action

7 days before milestone	Milestone becomes overdue	High risk created	Approval required	Approval completed
⬇	⬇	⬇	⬇	⬇
Request update from owner	**Notify owner**	**Alert project manager**	**Route to approver**	**Notify requester**

How CWM reinforces the behavior

Alerts & reminders

Triggers, conditions and actions send alerts and reminders automatically.

Update requests

Owners are asked for status before the review, not chased after it.

Approvals & routing

Approval requests route to the right approver; requesters are notified when done.

Task & field actions

Assign tasks, record dates, change field values, lock or unlock rows.

Automation should remove the chasing, not the accountability.

NOTE: CWM platforms like Smartsheet document automated workflows as a mechanism for notifications, reminders, approval requests, update requests, and related routine coordination.

WHAT WE LEARNED:

Five behavior shifts, supported by a CWM platform

FROM	→	TO
Scattered demand	→	**Structured intake**
Ambiguous responsibility	→	**Visible accountability**
Reactive firefighting	→	**Proactive risk management**
Manually assembled reporting	→	**Decision-ready visibility**
PM-driven chasing	→	**System-enabled coordination**

A reinforcing cycle

1. **Capture work consistently**
2. **Establish ownership**
3. **Execute and update the work**
4. **Surface risks and exceptions**
5. **Provide decision-ready visibility**
6. **Automate routine follow-up**

CWM is more than a collection of features. It is an **operating system for work**: better data & behavior.

DESIGN PRINCIPLES:

Seven rules for setting up a work management system

1. Configure the operating model before the tool

Agree intake criteria, triage states, decision rights, risk thresholds, status definitions and review cadence first.

2. Don’t confuse submission with approval

Intake is a decision queue, not a work authorization mechanism.

3. One accountable owner per outcome

An assignment or notification is not automatically a transfer of authority.

4. Differentiate risks from issues

Risks are uncertain future events; issues are already happening and need active resolution.

5. Dashboards are views, not truth generators

Credibility depends on source-data quality, ownership and refresh discipline.

6. Start automation narrowly

Pilot a few high-value workflows, test recipients and exceptions, and remove noise before scaling.

7. Validate live-account capabilities

Features, workflow behavior and licensing can vary by CWM platform plans and configuration.

The goal

Not better spreadsheets.

Better management habits.

When those behaviors become normal, CWM stops being a tool the PM maintains and becomes a system the organization uses to manage work.

The Future of Project Management Is Human-Centered Visibility



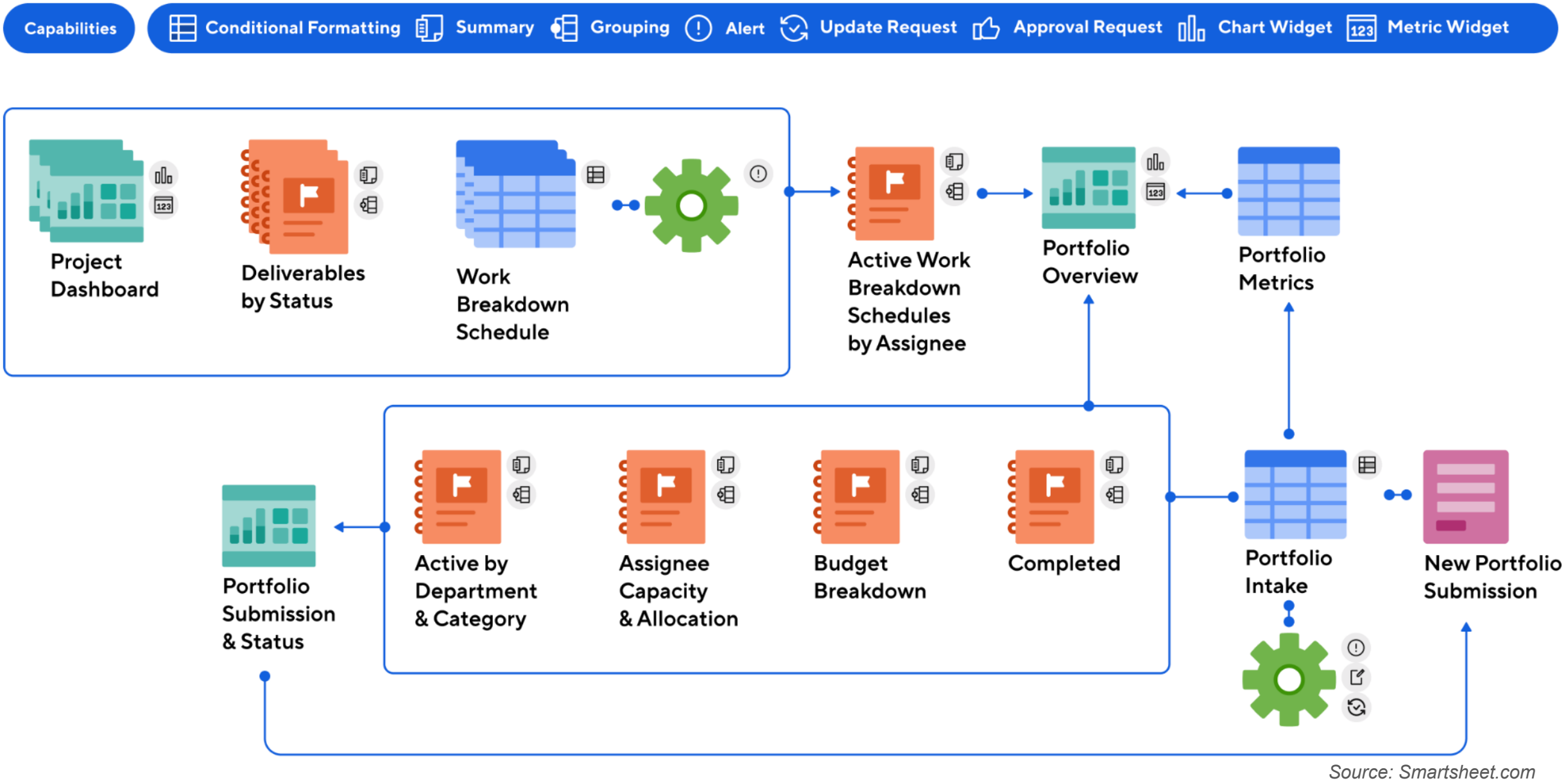
Don’t start by asking “What tool should we use?”
Start here:

1. Where is work getting hidden?
2. Where is information being recreated?
3. Where are decisions waiting because visibility is missing?

One thing this week:

Pick one project, find one place where work is hidden or information is being re-created, and fix that one thing.

When work is visible, connected, and actionable, you have visibility, synergy and velocity.



Source: Smartsheet.com

Intake process

Best Practice:

Establish Criteria-based priorities and define what is a project

CRITERIA	OPERATIONAL WORK	PROJECT WORK
Project Size (Cost, Duration, Team size)	**Cost:** less than $X **Duration:** Less than X months **Team size:** X or less people	**Cost:** more than $X **Duration:** X+ months **Team size:** more than X people
Complexity (Technical, cross-functional, project type)	**Technical:** <level of technical complexity> **Cross-functional:** <number of teams> **Project type:** <define criteria>	**Technical:** <level of technical complexity> **Cross-functional:** <number of teams or departments> **Project type:** <define criteria>
Risk (Risk factors)	Low level of risk across defined risk factors (e.g. reputational risk, schedule risk, operational impact, budgetary risk, resource risk, etc.)	Moderate level of risk across defined risk factors (e.g. reputational risk, schedule risk, operational impact, budgetary risk, resource risk, etc.)

Source: Acuity PPM

Sources:

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