Adrian Reed: Business Engagement on Technical IT-Enabled Projects: A Case Study

Introduction

As Business Analysts, we'd probably all agree that projects run much more smoothly when the right stakeholders are engaged at the right times.

The challenge can be finding the 'hook' that will allow you to get a stakeholder's attention and will enable you to keep them engaged throughout the project. This challenge is even greater on 'Technical IT' projects. It can be especially difficult to get business representation on these projects, since the project objectives might be seen as dry, uninteresting, and much less important than the day-to-day fire-fighting that our business colleagues are responsible for. Often business stakeholders are too busy running the business to spend time working on our projects. Yet we know that for projects to be successful we need business engagement. So how do we get our business stakeholders' attention?

At the Business Analysis Conference 2011, I presented a case study where my team and I managed to get and keep our stakeholders' attention and engagement. The purpose of this article is to reflect on the key lessons learned and share some useful insights.

The Case Study

A Financial Services Company had initiated a project to upgrade a core CRM system. Although it was termed an 'upgrade', the project would involve a complete re-build, re-implementation and migration from the existing system.

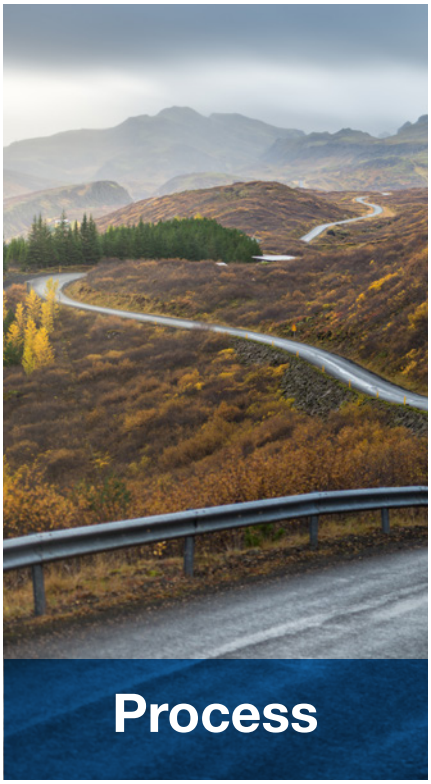
The project formed part of the IT portfolio which was managed by an IT project and programme manager. There was a view amongst some stakeholders that the upgrade would happen 'in the background' and therefore little (if any) business engagement would be required. My team and I felt that business engagement would be key to the project's success, and went about finding ways to engage them.

Achieving Engagement: The Methods that Worked

It was clear from the start of the project that there was a strong technological bias.

However, technology shouldn't ever exist in isolation. When implemented correctly, technology is an enabler, allowing business to operate more efficiently or effectively. However, the technology will be supporting business processes. Each business process will have stakeholders (people), and all of this will be happening within the context of an organisation. Although the technology was an incredibly important part of the project, it was clear that People, Process and Organisation would need to play an important part in our analysis.

We knew we'd need to cover each of these angles in turn.



Technology

Whilst technology was important, it was an enabler for the People, Process and Organisation.

Achieving Engagement: The Methods that Worked

Step 1: The Organisation

In order for us to ensure the success of the CRM Upgrade project, we needed to start with the 'Why?'. We needed to understand why the project was important to the organisation.

One of the most powerful yet simple questions a BA can ask is 'Why?'. It's essential that organisations and project teams fully understand the rationale for every project they are progressing. As BAs, we are in an ideal position to act as a 'critical friend' to our organisations, providing support but also challenge.

Asking 'Why?' helps us to understand the business value and customer value that the project will be delivering. Knowing this will help link projects to strategy, and how the project fits within the organisation's change portfolio. It will help us to know the significance of the project to the organisation.

We took time to reflect on why the project was necessary. We asked questions like:

What benefit will this project bring?

Why is it important that this project is progressed now (as opposed to next year)?

If the project is beneficial, what has stopped it being progressed sooner?

We spoke to immediate project stakeholders, but also spread the net further and spoke to technical Subject Matter Experts. We found that:

The project had urgency:

- The CRM software we were utilising was going into extended support, and only critical security patches would be available
- It was becoming more difficult to find technical expertise to support the software
- A number of tactical fixes had been implemented over the years which were making the software difficult to maintain
- Volumes of business were likely to significantly increase incoming months

The project had importance:

- The CRM package was a key module of a strategic platform that was utilised by internal and external users
- A number of high-profile projects were relying on the CRM system's continued operation

In summary, the software had become difficult and expensive to maintain or expand, and analysis showed that this was likely to get worse over time. There was an outside risk that implementing routine enhancements might have knock-on effects, and if we were extremely unlucky this could lead to temporary unavailability of the system. The primary motivation for implementing the upgrade was therefore risk mitigation. It was about ensuring the system remained robust and fit for purpose while the volume of business transacted continued to increase.

Understanding these project drivers would help us to explain the benefits to business stakeholders.

Step 2: People – Analysing the Stakeholder Landscape

In order to maximise our chances of success, we knew we had to find the right stakeholders and explain the value of the project to them.

We knew that understanding the requirements of actual business users would be important to the success of the project. Since the project would involve a complete re-implementation, we'd need a deep understanding of the functional and non-functional requirements and a rich understanding of the underlying information model. We'd also have the opportunity to remove any redundant functionality, and try to remove any 'tactical extensions' that were difficult to support and maintain.

Simply finding our stakeholders wouldn't be enough. We'd need to know who the 'key players' in the project were. We approached this from three angles:

Identify: It would be necessary to identify key stakeholders and stakeholder groups.

Categorise: We'd need to gain an understanding of each stakeholder group's interest and influence over the project and system.

Engage: It would be important to work with the project team to engage the right stakeholders and keep them engaged.

So how did we achieve this? The immediate challenge was finding all the affected user groups and stakeholders. We approached this by obtaining a complete user-list for the CRM system, and categorising this into functional departments. To gain an initial understanding of how the system was used, we reached out:

- A survey was issued to a large sample of the users, asking some basic questions about how the application was used (e.g. 'How often do you use the system?', 'Which screen(s) do you use the most?', 'Do other people in your team use the system?', 'Do you download any reports?')
- Follow up interviews were arranged with representatives from each of the main functional areas.

This process allowed us to categorise the stakeholders into two broad categories:

Core users: Use the system daily, are directly affected by any change or outage, significant interest in the project. Cannot effectively perform their duties without the system.

Occasional users: Use the system to perform a few fixed tasks. Use of the system represents a small part of their duties.

In addition, we were able to categorise each stakeholder based on the level of interest and the level of influence they had over the project.

Step 3: Building a Compelling Message to Gain & Sustain Engagement

A key turning point: By delivering a compelling message, we were able to gain business buy-in to the project.

When meeting with the relevant SMEs, we were able to explain the need for the project. We were able to explain why the project was both urgent and important (as outlined in step 1). This helped greatly to build interest and commitment. We were also able to deliver a positive message:

Upgrading the system would provide us with the opportunity to leverage additional capabilities in the new version of the application. So, if there were any 'business pain points' with the existing system, we could examine whether they could be addressed.

These messages were received extremely well by our business colleagues, and this was a real turning point for the project. Once we had understood and articulated the purpose of the project, we found that the business wanted to take active ownership. Even though the SMEs were extremely busy, they made time for our project. At this point, the project changed from being perceived as IT led and IT owned to being business owned. The business could see the benefits of the project, and were keen to champion the project through to completion. This shift in focus was achieved by showing the value – by translating the project from 'just another IT project' into a compelling value proposition for the business. It was achieved through regular, relevant communication and building rapport over a period of time.

Achieving Engagement: The Methods that Worked

Step 4: Strengthening Relationships by Understanding the Business Process Landscape

Understanding processes allowed us to size the work whilst strengthening relationships with our stakeholders.

Having carried out a thorough stakeholder analysis, we had determined that there were a wide range of users who relied on the application, working in various areas of the business. The next logical step was to understand which business processes either relied on, or impacted, the system.

There was a plethora of documentation available about the system – from procedure guides to old requirement documents, to functional designs, to technical design documents. The trouble was that many were out of date and couldn't be relied upon. Before we could understand the scale of the task in front of us, we needed to produce a catalogue of business processes. We took a three-fold approach to solving this problem.

Creating a process catalogue:

- **Existing process repositories:** Work had been carried out in some of the business areas to catalogue business processes. We used this as a robust starting point.
- **Document enquiry:** We 'skim read' a vast number of technical and business documents, pulling out details of processes.
- **SME interview & review:** We interviewed SMEs, and had them review the process catalogue.

Uncovering the business process landscape was important for a number of reasons. It allowed us to see the size of the task, and also provided us with an opportunity to build upon our relationships with SMEs and end-users. Meeting SMEs on their own territory, and speaking about their processes and responsibilities helped to crystallise their commitment and engagement even further.

Once all this information had been compiled, we reached a position of having a detailed knowledge of the breadth of the system, whilst also having a good knowledge of the stakeholder landscape. We were ideally positioned to execute the project through to delivery.

With so much system and procedural documentation available up-front, it could have been tempting to cut corners and place less focus on business engagement. This would have been a mistake. What is written in procedure guides does not necessarily represent what happens in the business, and we would have missed an opportunity to further engage the business.

Conclusion

The project referenced in this article started life being IT led and IT owned. Through the use of active stakeholder management, it was transformed into a value proposition that the business truly bought into.

This was achieved by:

- Focussing on People, Process and Organisation
- Shifting the focus from IT to the business
- Finding and articulating the business value
- Gaining a perspective of the operational environment of the system, and understanding the impact on the people who use the system to run the business
- Active and regular stakeholder management

About the Author

Adrian Reed is a true advocate of strategic business analysis and innovation. In his day job, he acts as Principal Consultant and Director at Blackmetric Business Solutions where he provides Business Analysis consultancy and training solutions to a range of clients in varying industries. Adrian is a past President of the UK Chapter of the IIBA and he speaks internationally on topics relating to strategy, problem solving, analysis and business change.

Contact:

Email adrian.reed@blackmetric.co.uk
Website www.blackmetric.co.uk
Twitter @UKAdrianReed
LinkedIn www.linkedin.com/in/adrianreed