Case Summary: Governing Organizational Improvements & DM

BIS, llc

The Challenge

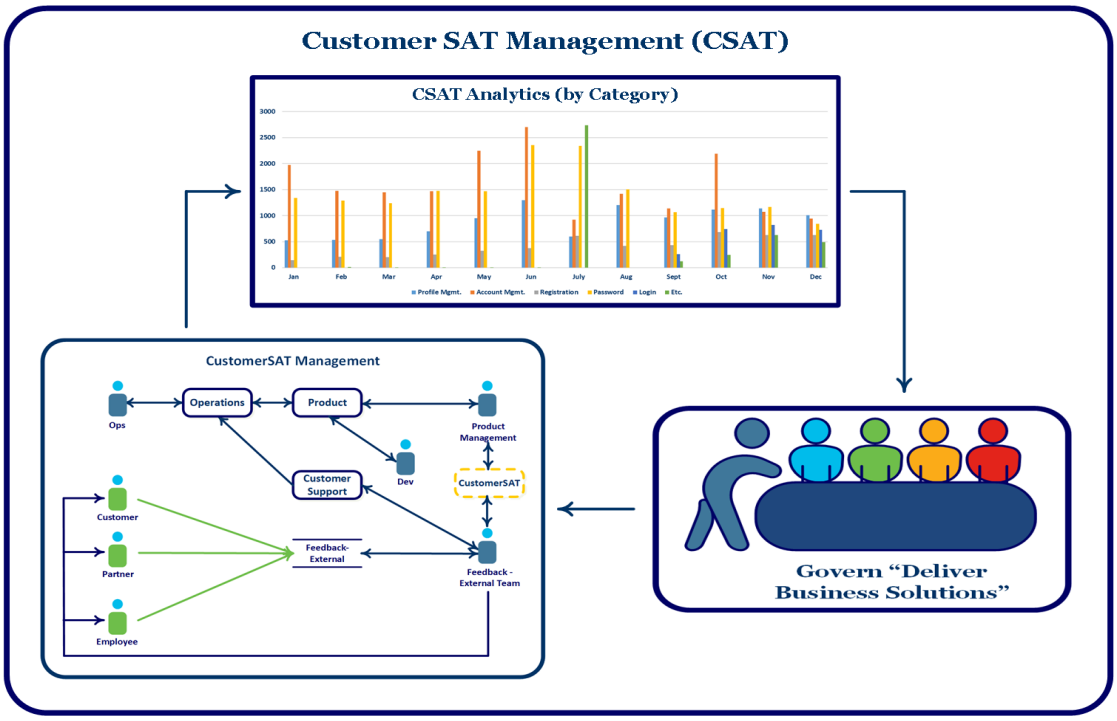
Our client is a high-growth Mid-Market business that grows its business through acquisitions and sales. They have offices all over the US and are increasing in complexity as their business expands. Increasing business size, lines of business (LOB), and revenue requires Enabling Business Functions like Information Technology (IT) to be increasingly aligned to the needs of the business. Executive Leaders engaged BIS to improve the IT Organization's ability to deliver to the business (i.e. Delivery Management / DM) what it needs based on business priorities.

The initial focus was "the state of IT delivery" and how to make improvements. The IT Organization was a very capable organization that delivered a lot to the business with limited resources. The fundamental needs were intact: secure stable network, stable servers with ERP applications, a Data Warehouse, various productivity solutions (CRM, email campaigns, industry-based process solutions), and several client-facing applications. The IT Organization operated at a high level of competency and had evolved to use progressive methods like Agile and Scrum for delivery.

There were communication gaps with the business. Business Leaders submitted requests but there was a lack of clarity what was occurring regarding their requests. The requests were sometimes submitted by proper procedure, but executives also submitted requests informally (e.g. word of mouth, phone calls, email, etc.). There were gaps in what was most important (that impacted the business) and what was delivered.

The IT Organization had a lean budget, so resources needed to be optimized. This is a matter of allocating the IT resources and subject-matter-expertise (SME) to the right efforts to produce business results. However, there were disconcerted efforts helping to deliver to Customers. It is imperative for Enabling Business Functions (e.g. IT, F & A, HR, etc.) to be aligned with Core Business Functions for the coherent business to work together gaining Customers and serving their needs (i.e. grow the business, increase Customer SAT). Refer to Customer Satisfaction Management.

The Solution



BIS engaged to gain an understanding of "the current state" and objectives through Executive Stakeholder Interviews. Customers, whether internal/external or executive/functional leaders, tend to be more authentic with formal work-efforts focused on improving outcomes. Though we discovered more discontentment (at a higher-level) than expected, our objective was to engage the "Voice of the Customer". Our objective outcome in the setting was to leverage the feedback productively in our rationalization of improvements and recommendations to the Corporate Executives that had committed to improve IT Delivery. The communication gaps uncovered revealed needs to improve operations as well as needs to improve execution of business strategy via alignment on priorities.

There were certain capabilities as "customer solutions" for one LOB that could be leveraged by a different LOB. This was the case with business requests (duplicated) and other solutions as well. It is difficult for lean organizations to avoid these issues. It is important to improve the IT Delivery Process with a focus on communication strategy: how business needs are identified, which needs are prioritized, and how to improve collaboration throughout Delivery Management. Communication with executives and the LOBs would be addressed better by group or committee(s).

Formalizing Identify, Plan, and Delivery processes required business requests to be rationalized and vetted by Stakeholders for priority and resource allocations. Governance also improved the fidelity of projects by increasing risk mitigation and issue management. Per communication strategy, Stakeholders are informed throughout the Deliver Process on progress, so expectations are level-set. Developing Governance and "Business Capability Building" was key to improving how the IT Organization would better engage and align with the business to drive strategic results.