



EXECUTIVE CHECKLIST

Initiating a service change, or project is easy. Ensuring, at the end, that the intended benefits were achieved, within the parameters set for the project, is extremely difficult without experience. This checklist puts the Organisation on the right track to ensure a service change or project is defined, setup, staffed and managed correctly.

Checklist	Description
Vision	<p>The desired change in service, be it a new IT system or introduction of IFRS, must be part of the corporate vision and in line with the organisation's short, medium and long term goals. Before proceeding, ensure that this is well understood by all participants, both local and global. Rather than create a project and force it to align to the corporate vision, ensure that the vision is understood, the services are defined then assess what projects may or may not be needed to achieve that vision.</p> <p>Determine global leaders of change, not local leaders of projects.</p>
Scope	<p>Often, without alignment to the corporate vision, companies bite off more than they can chew with multiple independent and uncoordinated streams of work in play simultaneously. Lay out a scope of activity, initially without timeframes, in a workshop with all senior leaders, hear their input and document the agreed boundaries of what the change will achieve and map all points to the corporate vision and desirable services. Insert dependencies and realistically envision if the organisation can absorb the change outlined in the duration specified. This ensures later on that all management is engaged with the changes in the services required.</p>
Benefits	<p>With the scope of work in hand, draw up an profit and loss chart for each item in scope, lay out the benefits it is designed to achieve and assign metrics to each item. How will it be measured? Who will be responsible for measuring it and who will be responsible for paying the cost associated with achieving it?</p>
Budgeting	<p>Now that the Benefits are understood and the cost owners assigned, put in place a controller who is responsible for the ongoing management of the benefit tracking and project costing mechanism. This person or group will be the controller of all spend irrespective of source, give comfort to the executive team that costs are being correctly managed and benefit goals are being achieved. Also this person will ensure that projects are tracking their benefit deliveries and be an early warning mechanism to ensure that projects are on track. This will be someone who will have experience in large programs and be linked to your procurement department and also provide sense checking on costs.</p>
Change and Communication	<p>Understand and communicate to the company regularly that change is coming, inform the organisation of the benefits to be achieved and that the executive is committed to this investment. Request cooperation and support and assign a change manager internally, someone well respected, to continuously work on ongoing support and gaining consensus with all internal groups. Identify and assign the Change Champions and Service Owners, internal and external. Introduce and promote them to the corporation. Begin the budgeting process in-line with the scope and benefits.</p>

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Culture	<p>Realize and respect that each project location has its own culture, way of working and expectations. Ensure that expectations are set early regarding the way of working and input these into the selection process for people and suppliers. Successful projects have a strong and cohesive organisational culture and positive behaviours that are well understood.</p>
Sponsorship	<p>Document clearly the participation model. Assign roles and responsibilities, gain agreement and begin the external engagement process of selection. Accept that there is no one company that can deliver everything you need, but rather you will need strong consistent internal leadership to drive the changes you define.</p>
House Cleaning	<p>Before beginning the partner engagement process, there are 5 key areas that internally the organisation can begin on, independently to ensure that money and time is not wasted during the project execution phase.</p> <p>Services. We must define the services of the organisation that we are creating. Services are end to end activities that the organisation will deliver with global systems and skilled people. Define your services first and then look at what IT systems are needed to support these global services. For example, "Management Accounting" and "Product Manufacture" are internal services that must be clearly defined. Service Owners drive significant value and consistency into the organisation. (See the paper on Service Technology Owners)</p> <p>Strenuously avoid technology pillars in the organisation, rather champion Business Services and align, Business Owners, Technology Owners, Process Owners, Data Owners, Security Owners, Support Owners etc to the end to end Service.</p> <p>Business Processes. The first question that consultants ask is "what is your business process". Instead of paying them to find out, spend a few months to get your key business process documentation in order. This will save project time as well as help potential vendors partner with you right from the beginning. Identify "process owners" who will champion process confirmation and change. Multiple processes are linked to one service.</p> <p>Standards. Lets say that you want to implement a management change such as IFRS or a new global chart of accounts or global financial consolidation. Many organisations take the IT systems project as an "opportunity to improve" their financial practices. Don't make this mistake. Some initiatives need to come after the IT change and some before. Don't mix these major changes with IT changes. Many organisations cannot handle the degree of change and forcing this change also significantly increases the length, and cost, of the IT project.</p> <p>When approaching Standards, accept that they will change and build in the facility to manage and evolve with that change. After all, if we need to change that much, there must have been something preventing the change from happening until now, likely a "best of breed" application that didn't handle evolution. Beware of consulting resources talking about standardisation. Speak more about continuous improvement and evolving standards in systems and our capacity to move and improve with that inevitable change.</p> <p>Data Management. One of the least understood and most cost intensive activities on a project is data cleaning. Form an internal team to clean up your master data, identify "data owners" who own data objects throughout the project life. A good example is your customer master and price list/discounting structure.</p>

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House Cleaning	<p>The reason that data management is conducted before systems implementation work is that the type of resources needed to change data is very different from those resources that will be employed to implement systems and often they are a lot different in cost. Don't end up paying expensive consulting organisations to work on data preparation.</p> <p>Systems Landscape. Before the project begins, document all your IT systems, their linkages to other systems and highlight external and internal reporting systems. Estimate interface volumes and batch schedules.</p>
People	<p>Successful projects engage the right people, early, in efficient teams and ensure that they are engaged positively for the long term. Turnover of senior project members or executive sponsors is a project killer. Recruit people to the project both internally and externally through an interview process that supports the right culture and change.</p> <p>Begin early on before the project begins to identify motivated, knowledgeable and pro-change individuals in all departments who are candidates for project participation. Be sure to define your Service Business Owners, Service Technology Owners, Service Infrastructure Owners, Service Process Owners, Service Data Owners, Service Security Owners, Service Support Owners and Service Technology Partners. Link their remuneration to success and KPIs associated with ongoing success, not project delivery.</p>
Selection	<p>Determine the selection criteria for all key decisions. Whether selecting the software package, implementation vendor, resource provider or key project members, determine your criteria first, then select the partners that match those criteria. Select based on skill and experience, not on company size or language ability. A bad resource who can speak Japanese is still a bad resource. Ask vendors to respond to your selection matrix with their "fit" for each item.</p>
Japan Projects	<p>Time and Budgets In Japan, due to the need for translation and interpretation and the Japanese business style, all projects tend to take around 2.5 times longer than the initial budget guess from internal estimators. Before establishing a budget, ensure that it is reviewed with someone familiar with project implementations in Japan and sense checked against projects of similar dimensions.</p> <p>People As mentioned above, always recruit people based on skill. Project implementation teams are more often than not, not totally bilingual. Ensure that you insert the correct amount of translation and interpretation support into the project. The cost of a good consultant plus a portion of the translation budget is cheaper than a bad consultant who speaks Japanese.</p>
Approach	<p>Prototype early. In nearly every project users are frustrated that they cannot have input and feedback early in the design process. Traditional waterfall methods introduce the to-be solution too late to change course if it is wrong. Build a prototype within weeks of beginning and engage the correct parties early on to have a say in aligning the benefits of the project with what is actually being built.</p>
Go-Live Criteria	<p>Right from the beginning of the process, all Service Owners will have in their heads their personal "go-live criteria". This is a list of items, some logical, some emotional, that they believe are the absolute must deliverable items for them. i.e. without these items, the service change or project is a failure. And they will evaluate these before allowing go-live to happen. Get these out early and make sure that these are being addressed proactively. Success is based on these items.</p>

