

# JAMES A ROBERTSON AND ASSOCIATES

## EFFECTIVE STRATEGIC BUSINESS SOLUTIONS



### 4. Programme and Project Design to Achieve Success

***Why your ERP is NOT delivering and how to FIX it***

***The Critical Factors for Information Technology Investment Success***

***Two Day Course***

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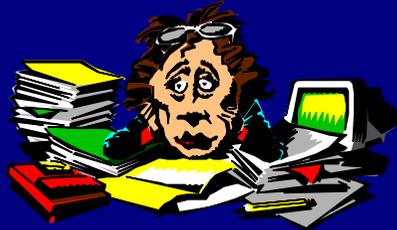
# WHERE IN THE WORLD IS I.T. GOING?



1. Dramatic failures, litigation and legislation (5%)
2. Software company shake outs (6%)
3. Long software product life spans (7%)
4. Less is more (10%)
5. Executives take custody (20%)
6. Emphasis shifts to decision support (22%)
7. Corporate level solution innovation (30%)



**Radical redefinition  
of the industry**



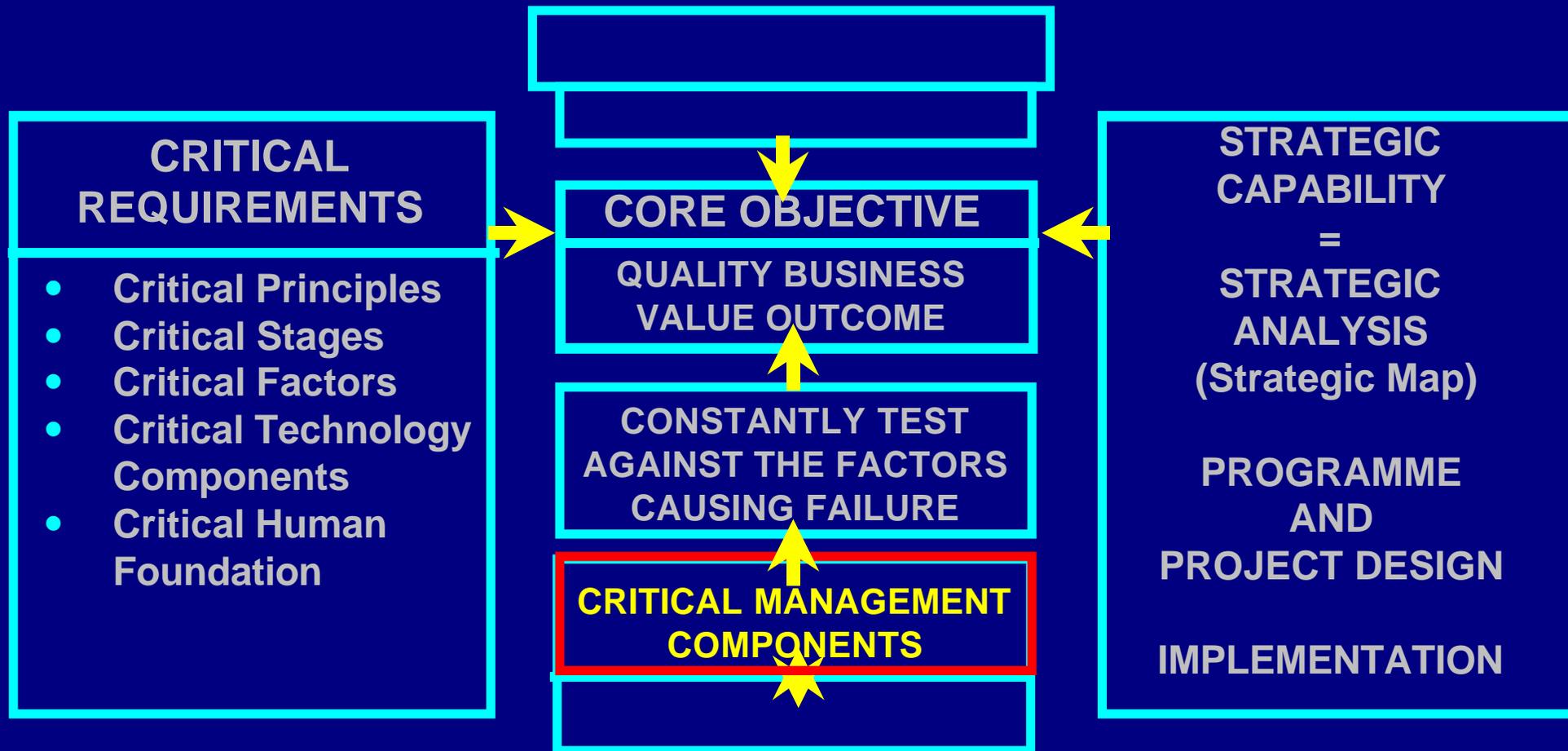
**Leading edge  
technology mothballed**



**Run of the mill  
technology = worlds  
most successful aircraft**

**A challenging and exciting place to be**

# SOLUTION & COURSE MAP



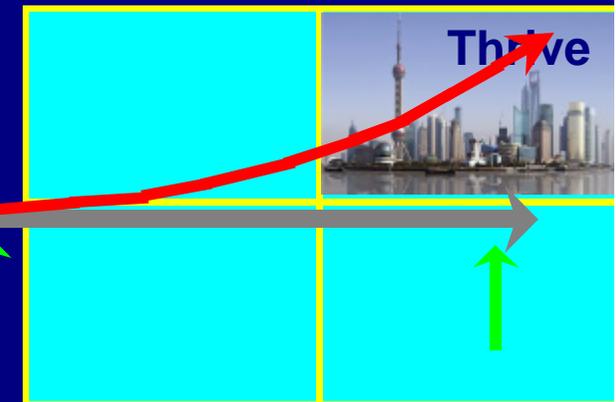
# MANAGING FOR SUCCESS



1. Executive Custody (25%)\*
  - CEO and other executives roles
  - Business optimisation / systems executive
  - Strategic solution architect
  - Technical team leader / programme manager

2. Strategic Solution Architecture (18%)\*
  - Designing the solution to fit the
  - business strategy and the business
  - - the right things
  - Requires specialist expertise\*

3. Strategic Alignment (16%)
  - Ensuring ALL components of the plan and solution are aligned with business strategy
  - AND
  - all components of the business are aligned with business strategy and plan



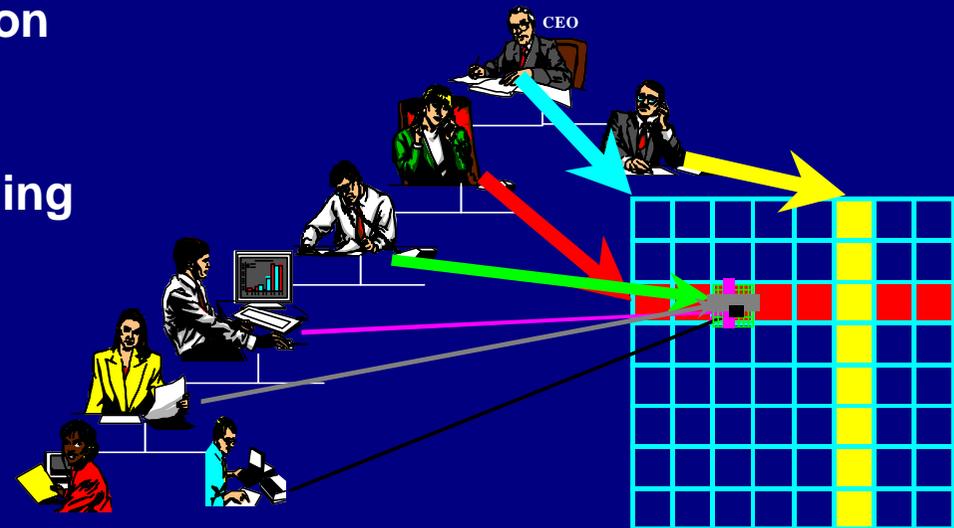
\* First 3 = 59%

# MANAGING FOR SUCCESS

## MANAGEMENT COMPONENTS



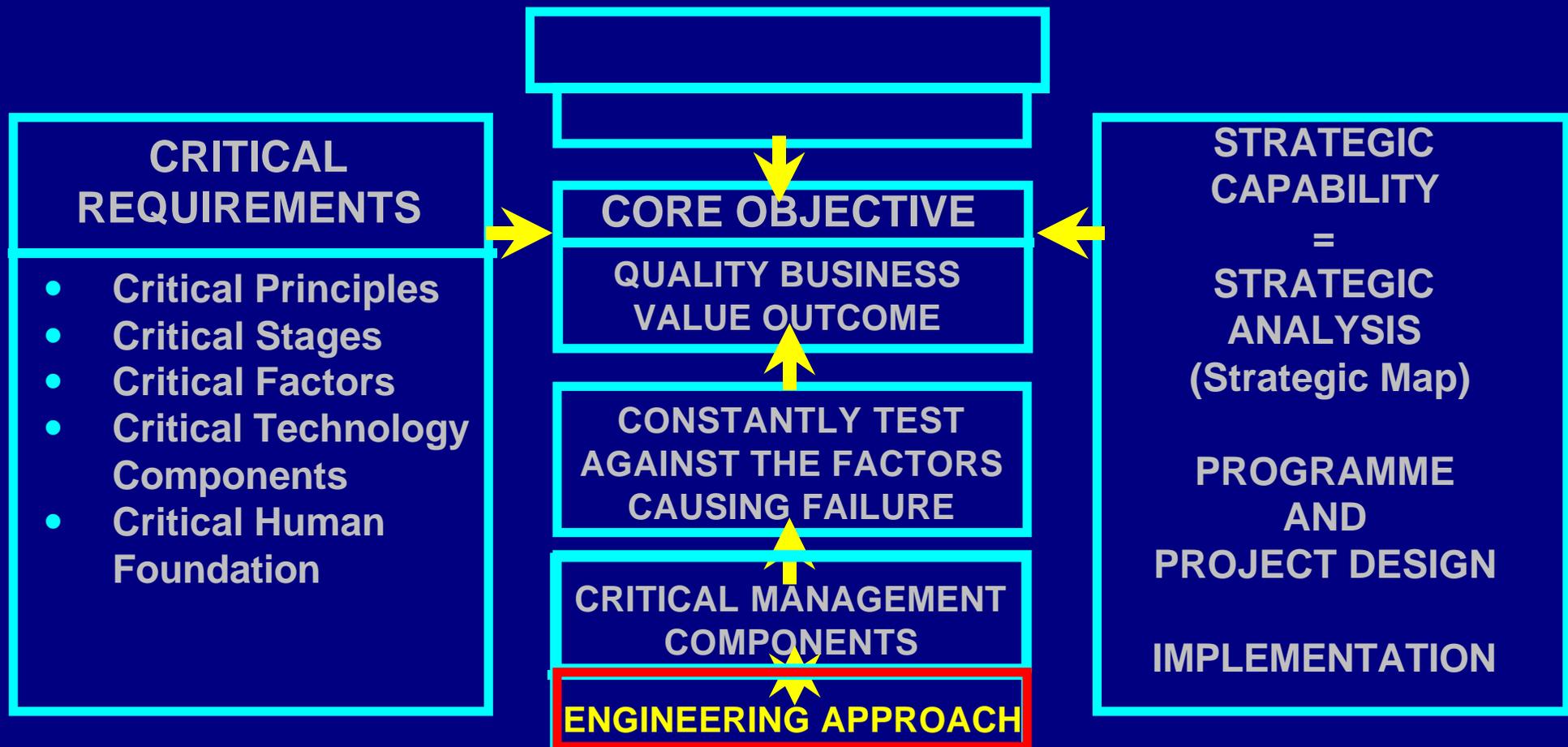
4. Business Integration and Optimization (14%)
5. Detailed Project Management Including Programme Schedule, Budget and Resource Management (12%)
6. Data Engineering (10%)
7. Technology Components (5%)



The probability of failure reduces from 100% in accordance with how effectively each of the above are defined, staffed and executed for the duration of the programme through to final business outcome delivery

Start at the top and work down  
executive questions -- especially economic value proposition

# SOLUTION & COURSE MAP



# LACK OF AN ENGINEERING APPROACH

## CRITICAL ATTRIBUTES OF AN ENGINEERING APPROACH



- A. Meticulous design detail
- B. Meticulous planning detail and costing
- C. Multi-disciplinary teams and specialists
- D. High professional standards and legal accountability
- E. Cross checking and double checking of all important details
- F. Physical world metaphor and impact analysis
- G. Engineers know the limitations of their expertise and when to call in specialists



Meticulous design detail

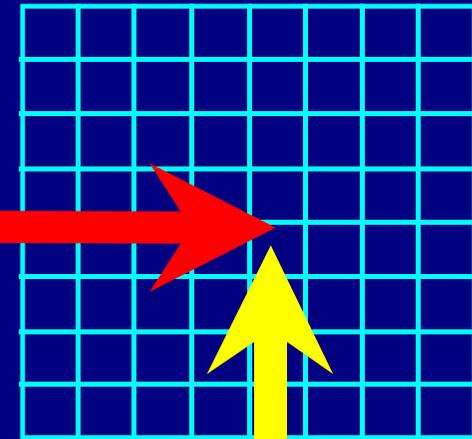
Meticulous planning detail and costing

# MATRIX ANALYSIS OF PROGRAMME GOVERNANCE OF THE APPROACH



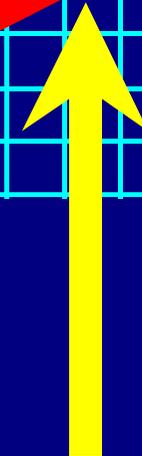
1. Executive Custody
2. Strategic Solution Architect
3. Clear Strategic Perspective and Alignment
4. Business Integration and Optimization
5. Programme Schedule, Budget and Resource Management
6. Data Engineering
7. Technology Components

**WHAT**  
**Primary**

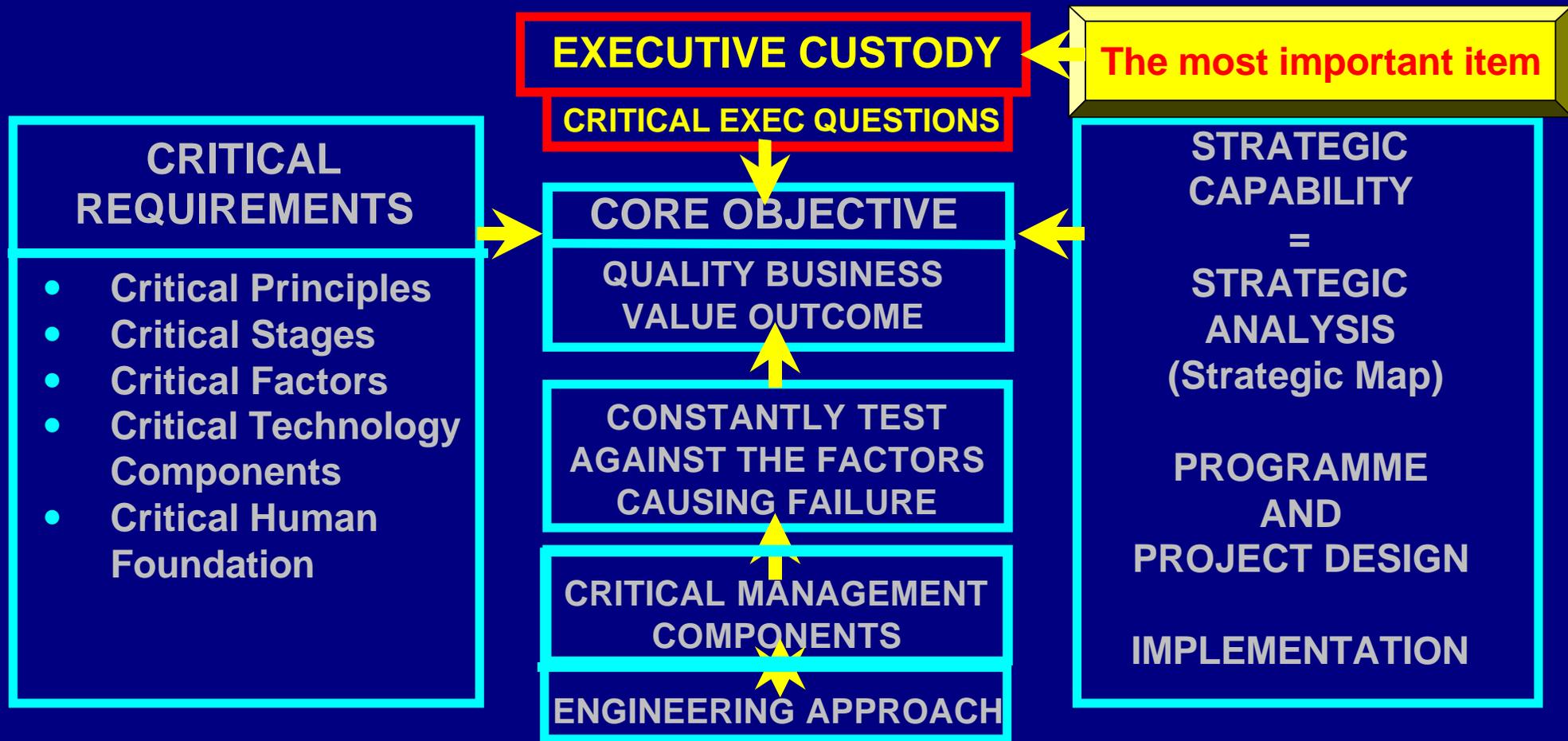


- A. Meticulous design detail
- B. Meticulous planning detail and costing
- C. Multi-disciplinary teams and specialists
- D. High professional standards and legal accountability
- E. Cross checking and double checking of all important details
- F. Physical world metaphor and impact analysis
- G. Know limitations of expertise and when to call in specialists

**HOW**



# SOLUTION & COURSE MAP



# EXECUTIVE CUSTODY

## Role of executives in Strategic Leadership



1. ***"The greatest barriers to strategy are often self imposed and many are internal. Strong leadership by the chief executive officer is almost a necessity if strategy is to be created and implemented"*** Professor Michael Porter
2. **Executive management who are seeking to use information technology as a competitive tool must have an intimate business relationship with the tool and the data it contains**
3. **Custody in the sense of a custodian parent in a divorce - FULL responsibility and accountability - this is MY business system - at a comparable level to - this is MY factory / warehouse / mine / etc**

# CRITICAL EXECUTIVE QUESTIONS

Questions Every Executive Should Answer Before Saying "YES"



1. **VALUE PROPOSITION** -- Do I have a clear definition of the value proposition that I own now and can communicate to the rest of the organization?



2. **ACHIEVING THE OUTCOME** -- Do I have a clear definition of how the outcome will be accomplished?



3. **ACCEPTANCE OF EFFORT** -- Is there real acceptance of the real effort and investment required?

4. **BUSINESS COMMITMENT** -- Is there real business commitment?



# CRITICAL EXECUTIVE QUESTIONS

Questions Every Executive Should Answer Before Saying "YES"



5. ACCEPTANCE OF EXECUTIVE ACCOUNTABILITY -- Am I (CEO / sponsoring executive) willing to be held accountable?



6. ACCOUNTABILITY OF BUSINESS LEADER -- Am I willing and able to hold the responsible executive / manager accountable?



7. ACCOUNTABILITY OF TECHNOLOGISTS -- Am I willing and able to hold the service providers and vendors accountable?



# **MANAGING FOR SUCCESS**

## **CRITICAL COMPONENTS OF EXECUTIVE CUSTODY**



- 1. CEO leadership, clarity, purposefulness, empowerment of subordinates, etc**
- 2. Availability, effectiveness and efficiency of executives**
- 3. Executive team role clarity, commitment, team work, constancy of purpose, etc**
- 4. Business optimization executive**
- 5. Strategic solution architect**
- 6. Technology / technical team leader / executive**
- 7. Other aspects required to achieve executive custody = ownership "plus"**

# MANAGING FOR SUCCESS

## AVAILABILITY, EFFECTIVENESS & EFFICIENCY OF EXECS



- 1. Subordinates at all levels motivated, empowered to act, supported in event of sincere mistakes, leadership by example, facilitation to achieve NOT domination, clear hierarchy and respect for hierarchy, teams NOT committees**
- 2. Effective strategic analysis, design and execution methods, standards, practices, etc**
- 3. Executives have equipped, motivated, trained, loyal, long term personal assistants**
- 4. Effective time management tools, methods, training and practical day to day implementation -- NOT about computer based technology**
- 5. Filing and document management standards consistently applied throughout the organization -- this is about standards, practices, training, etc and NOT about technology**

# MANAGING FOR SUCCESS

## AVAILABILITY, EFFECTIVENESS & EFFICIENCY OF EXECES



6. Executives focus their attention on activities which create sustainable value relative to:
  - Customers
  - Personnel
  - Suppliers
  - Shareholders
  
7. Executives equipped to think and act strategically and take effective strategic decisions on a continuous basis -- includes knowledge, method, systems, training, etc

**ALL these factors are vital for success in terms of executive availability, effectiveness and efficiency, the items with higher weight are necessary for the items with lower weight to be effectively achieved -- specifically so that executives are freed up to focus on items 6 and 7 which is where executive effectiveness is attained**

# COMPONENTS OF ACHIEVING EXECUTIVE CUSTODY



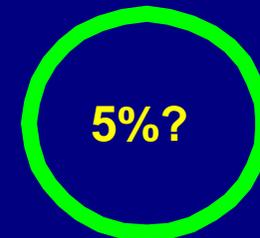
1. Engagement
2. Leadership
3. Prove it works
4. Make it work

**Executive Custody is an attitude, a state of mind, NOT a large amount of work**

# CRITICAL FOCUS AREAS OF EXECUTIVE CUSTODY

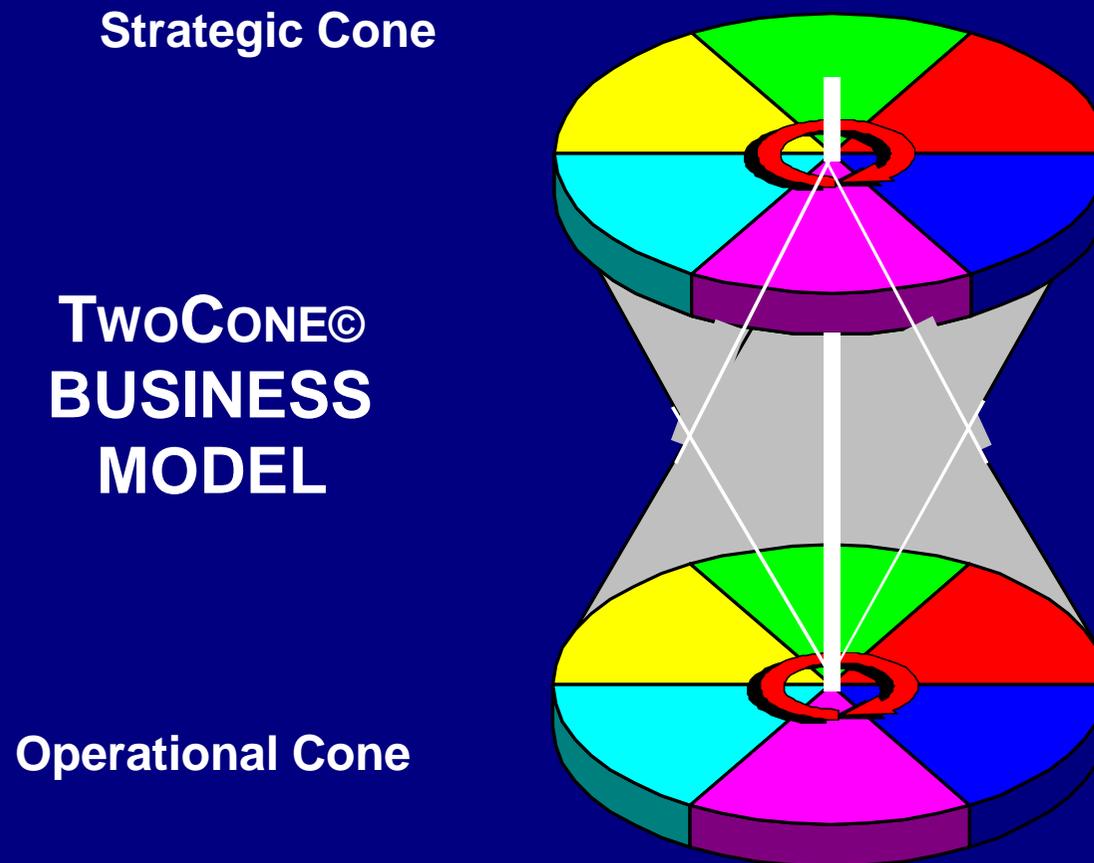


1. Creating and delivering value to customers
2. Differentiating from competitors
3. Motivating and leading personnel
4. Meeting and exceeding owner expectations
5. Building exceptional partnerships with suppliers
6. Integrating and optimizing the business
7. Day to day operational efficiency and effectiveness



# BUSINESS INTEGRATION AND OPTIMIZATION

## Organizational Optimization



# **BUSINESS INTEGRATION AND OPTIMIZATION**

## **Organizational Optimization**



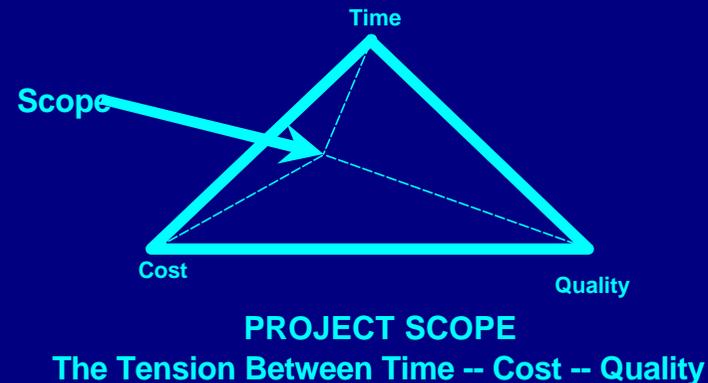
- 1. Strategic Definition**
- 2. Strategic (TopCone©) Optimization**
- 3. Strategic and Operational Alignment**
- 4. Operational (BottomCone©) Optimization**
- 5. Strategic and Operational Focus (Organizational Structure)**
- 6. Optimize and Integrate Information Systems, Communication, Business Processes, etc**

# CRITICAL PROJECT MANAGEMENT COMPONENTS WITHIN THE PROJECT TEAM



1. Project Leader - 27%
2. Custodian of Factors Causing Failure, Principles, etc - 21%
3. Missing Knowledge - 18%
4. Time, Quality and Cost (Different People) - 12%
5. Plan Administration - 10%
6. Plan Design - 8%
7. Technical Work - 3%

Depending on size of project one person can play multiple roles BUT the tension of multiple people is helpful even on small projects



# TECHNOLOGY COMPONENTS THE ACTUAL I.T. PROJECT



## Guided by projects supporting each of the Critical Factors

1. Operational and Transaction Processing Systems
2. Automation Systems
3. Soft Information Acquisition and Processing Systems
4. Decision Support Systems
5. Hardware, Networks, Operating Systems and Database Systems
6. Systems Integration Components
7. Operators, Users, Customers and Decision Makers

# OPERATIONS / PROGRAMME DESIGN FOR SUCCESS



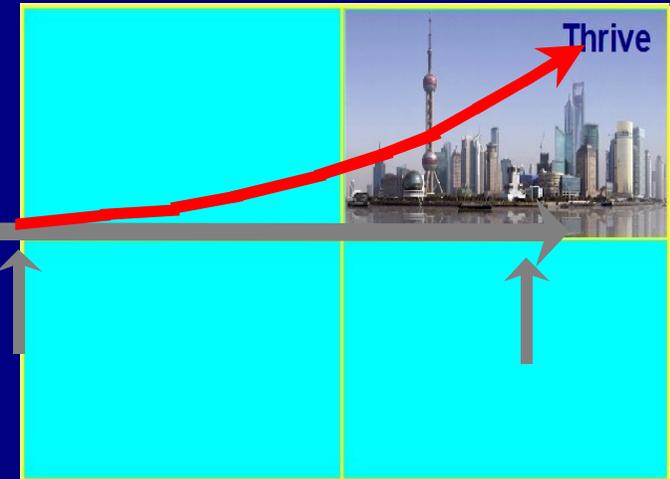
## CONCLUSION

- A systematic structured management context
- Factors giving rise to failure effectively managed
- To achieve success

# MANAGING FOR SUCCESS



1. 25% -- Executive Custody and Policy
2. 18% -- Strategic Architecture
3. 16%-- Strategic Alignment
4. 14% -- Business Integration and Optimization
5. 12% -- Project Schedule, Budget and Resource Management
6. 10% -- Data Engineering and Information Management
7. 5%-- Technology Components



**IT IS ALL ABOUT PEOPLE!**

\* First 3 = 59%

# PROGRAMME DESIGN FOR SUCCESS



## QUESTIONS?

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*Finding the missing pieces of your I.T. and strategy puzzles*

*Please remember the evaluation forms*