7 Deadly Sins of Software Implementations:

SIN #5 - Choosing the system before defining the process

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SIN #5

'**Choosing the system before defining the process**'

The implication is that one should always define the process before choosing the system.

If that is the implication, do we agree with that? Do we disagree?

Is SIN #5 always a sin?

Let's explore this question through the lens of some real life scenarios:

> ➢ Finance & Accounting system selection

> ➢ Sales Force Automation (SFA) purchase

> ➢ SFA selection as a by-product

> ➢ Corporate policy decision

> ➢ Process maturity vs. system capability

> ➢ Elaborative style of 'Agile-like' methodologies

Finance & Accounting System Selection

- ➢ Aging Finance & Accounting system out of support and in need of replacement

- ➢ Extensive requirements gathering and process definition phase

- ➢ Evaluation & selection process against requirements document

- ➢ Traditional waterfall methodology

Results & Conclusions

➤ Finance & Accounting had not changed significantly in decades

➤ Having stakeholder, users, or exec sponsors sign off on requirements docs is ineffective

Conclusion:

Given the common and universal capabilities of mainstream F&A systems, we should have spent less time on process

Sales Force Automation (SFA) Purchase

➢ Preceded by failed SFA attempt several years prior

➢ IT Mgmt group with little, but growing influence

➢ SFA product selected and purchased by user group based on niche product features

➢ Definition of core sales process was not considered

Results & Conclusions

➢ Product did not cover basic, universal sales process without extensive customization

➢ No commonly accepted sales process on which to design system and data model

➢ No basis for expectations of system capability

Conclusion:

More focus on process definition would certainly have high-lighted the product's unsuitability.

SFA Selection as a By-product

➢ Selecting an enterprise technology platform for the foundation of 80% of corporate systems

➢ SFA component accounts for just 10% of overall application architecture

➢ Corporate SFA requirements quite limited, but expected to mature over time

➢ All mainstream SFA products have offered core needs out of box for >5 years

➢ Business sponsor unable to engage

Results & Conclusions

➢ Decided to choose platform regardless of sales process needs for following reasons:

- SFA not important enough to swing ent. platform decision

- SFA needs are now understood and very simple

- Immature sales process isn't commonly accepted

Conclusion:

This was the right decision, the outcome will

Corporate Policy Decision

➢ New sales & marketing strategy based on 4 distinctly different tactics was launched

➢ Different techniques and measures were associated with each of the 4 tactics

➢ A policy decision was made to change sales compensation structure to reflect performance against these tactics

Results & Conclusions

➢ Quickly apparent the existing process was not capturing necessary data

➢ Later apparent that data model couldn't support new requirement (in a timely way)

➢ Policy had to be reversed, people looked silly

Conclusion:

Obviously, we should have defined the process first.

Process Maturity vs. System Capability

➢ Company is in need of a better means of managing customer data

➢ Existing model is extremely immature, very little from existing practice to learn / model

➢ Any CRM system offers 10X the breadth of functionality and capability than can be utilized

➢ Business stakeholders are only starting to think about the importance of managing

Results & Conclusions

➤ Company did not wait traditional customer data owners to define ideal future processes

➤ Action was required to take advantage of immediate opportunities and threats

➤ Basic CRM product features were introduced in a limited scope deployment, and expanded the understanding of what could be done

Conclusion:

In this case leading with technology was required to spark the innovation and creativity required for process re-engineering.

'Agile-like' Methodologies

➤ Cloud / SaaS based technology is preferred for a company's core business process

➤ Cloud / SaaS deployment methodologies are typically light on up front process definition and heavy on elaboration during sprints

➤ Deployment project initiated with a very high level review of the business

Results & Conclusions

➢ Functionally, the delivered product works well and meets expectations

➢ Migration of data turns out to be much more difficult and expensive than advertised

➢ Security and performance do not meet expectations and require enhancement

<u>Conclusion</u>:

Deeper process definition up front would likely have uncovered data and non-functional requirements.

Conclusions

- Technology management is an ambiguous field - we grasp for clear guidelines to follow

- SIN #5 simply has too many exceptions to be useful as a rule of thumb

- Sometimes it's appropriate to fully define process before system selection, sometimes it's just not practical or necessary