



Work in process

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System selection, done right — Part 3

One of the first steps in any project is to define the roles and responsibilities of the participants as well as to estimate the amount of time needed. So now that we've looked at how to select a software system (see January/February at www.camagazine.com/selection1 and March at www.camagazine.com/selection2), let's turn to the people side of the equation.

In an ERP selection project, the following roles are typical: project sponsor, steering committee, business-process owners, project manager, subject-matter experts, technical lead and, in some cases, an external consultant. A good way to communicate these roles is to draw up a few charts. On the first you would list various responsibilities on the left side — such as acquiring funding, managing

It is usually easy to determine who the project sponsor is and who should be on the steering committee. The project sponsor holds a senior position and is able to allocate resources to a project. The steering committee is also a senior group that is responsible for the project at a high level. It reports to the sponsor (who is usually on the committee) and must include people who can represent all business processes included in the project scope. The steering committee will spend about 3% of its time on the project from start to finish.

The project manager's role is often difficult to fill because few people in the organization have enough experience to handle the many challenges it presents. In theory, the responsibilities sound fairly straightforward — keeping track of the budget as well as all the tasks, when they are to be completed and by whom. But things can

Deliverables/roles (P=prepare, R=review and advise, A=approve)	Project sponsor	Steering committee	Project manager	Business- process owners	Subject- matter experts	Technical lead	Consultant
Schedule	—	A	P	R	—	—	P
Scope	—	A	P	R	—	—	P
Risk management	—	A	P	R	—	—	P
Criteria to make decision	—	A	P	R	—	—	P
Requirements	—	A	R	R	—	—	P
Existing business process		R	R	A	R		R

scope, budget and timing, etc. Across the top of the chart you would have a separate column for each role, where you would check the one responsible for each task.

The deliverables chart would set out those responsible for different reports. For each role it would specify whether the responsibility was to prepare, review, advise on or approve the report (see chart above). Some organizations prefer to use a similar chart called a RACI (responsible, accountable, consulted and informed). In a third chart, you might assign names to each role for each department involved in the project — for example, under project sponsor you might have Brian; under steering committee you might have Joe, Jane, John and Bill, etc.

get complicated when there are requests for changes or when resources are not available as planned. Moreover, project managers often become product experts and all communication to vendors is filtered through them. They can spend 50% to 100% of their time on an ERP project during implementation and about 10% during the selection process. Ideally, they have good business knowledge and organization and communication skills as well as some project-management experience.

Business-process owners are primarily responsible for a business process and/or a department in an organization. In some smaller organizations, they can also be subject-matter experts. If not sitting on the steering committee

or acting as subject-matter experts, they review and approve work done by others. They could spend 3% to 5% of their time on the project.

Subject-matter experts know the existing business processes in detail and therefore can help design the new processes and test the new system. Their involvement is minimal during the selection phase, but they contribute up to 25% of their time during the implementation for training, design and testing. The time spent depends on how fast the implementation needs to be completed. Most small and mid-sized organizations can't afford to have the subject-matter experts dedicated to the implementation, so the trick is to balance their time so they can get their usual day jobs done.

The role of the technical lead is to make sure the computer and network infrastructure is adequate for the new system. He or she will also help ensure the new system meets the more technical requirements, such as security, integration features and customization capabilities. The technical lead might also be asked to help in the implementation by writing reports for the new system, among other tasks. He or she will spend about the same amount of time on the project as the subject-matter experts.

Finally, there is the consultant, who should be facilitat-

ing the process based on experience in software selection and implementation as well as knowledge of the industry. How much time depends on the complexity of the business processes. Usually the most time-consuming task is to interview the subject-matter experts, then document the existing business processes and define requirements. If there are 10 business processes in scope, it would take about 40 hours to complete this review and documentation. Once all the other tasks are added, the total amount of consultant time for an organization with 10 business processes in scope would be about 120 hours.

As with any project, picking the right team is the most important factor in predicting the success of an ERP project. Your objective should be to find the people in the organization who have the necessary motivation, skills and respect from their peers to make a valuable contribution to the project. Managers must make allowances in their daily schedule to make sure they have time to do it right.

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