# Where are you in Managing Big System Implementation?

## A Do-it-Yourself Assessment

**Endeavor Management**

2700 Post Oak Blvd.      P + 713.877.8130
Suite 1400               F + 713.877.1823
Houston, Texas 77056     www.endeavormgmt.com

**Endeavor**

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## Overview

This Assessment is designed **to cause a dialog** within an organization that is selecting or implementing a "big technology system." Implementing any big system has proven to be a risky proposition for most companies. To deal with that risk, many companies use Risk Management as a disciplined practice to ensure that the chances of success are as high as they can be.

This Assessment is designed to promote a dialog around three different kinds of Risks:

1. Technical Risk - Will the system **work**/operate as advertised once it is installed?
2. Organizational Risk – Will the organization **use** the system to the needed level once it is installed?
3. Business Risk- Will the newly installed system work through business processes to "**pay off**" for the firm?

So how is your firm doing in Managing Risks on that big, new technology project? What is your firm going to do to ensure the best overall chances of success?

- Top management within the business units must be accountable for both economic returns and innovations that support company strategy.

## Instructions

Think of one big system that is in the process of design, development, or implementation in your company. Answer each question by circling a number on the **1 to 7 scale**, where the numbers represent the following:

- One (1) represents definite "no"
- Four (4) represents "somewhat"
- Seven (7) represents a definite "yes"

If you want, pick a partner or two who might have a complementary view of your firm and ask them to join in the fun. If you do use partners, have them complete their Assessment individually and then make a second trip through the scales as an informal team.

# Where are you in Managing Big System Implementation?

## Section One: Managing Technical Risk

Are we taking the actions needed to ensure that the new system "will technically work?"

| Practical Actions | Scale (Select one number on each scale) | | | | | | |
|---|---|---|---|---|---|---|---|
| 1. We have defined a technical project around the Delivery/installation of the system | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 2. We have a senior Information Technology Executive as the Delivery Project Manager | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 3. We have a technical Steering Committee that is made up of other senior IT managers and Key user managers | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 4. We are using rigorous project management to deliver the system "on requirement, on time, and on budget" | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 5. We have a technical risk management program in place on the Delivery project | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 6. We have Delivery project team members who are highly competent in their assigned technical tasks | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 7. We have ensured that systematic work processes are in use to keep users informed of progress on the Delivery Project | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 8. We have ensured that we have the budget dollars and time to be able to reasonably expect the success of the Delivery Project | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |
| 9. We are comfortable overall that the new system "will work" technically after it is installed | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 |

Compute your score by adding scores for each of 9 scales

(See scoring information on page 6 for interpretation of score)

Total Section One Score [ ]

# Where are you in Managing Big System Implementation?

## Section Two: Managing Organizational Risk

Are we taking the actions needed to ensure that "the organization will fully utilize the new system?"

| Practical Actions | Scale (Select one number on each scale) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 1. We have a user project defined around preparing the new organization/workers for the use of the new system to do the unit's work | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 2. We have the senior manager of the user organization as the User Preparation project leader | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 3. We have employees who are key to implementation success serving on the User Preparation team. | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 4. We have developed and communicated to all affected workers a vision and a rationale for how the work of the firm / unit will be done with the new system | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 5. We have gotten a handshake from all affected employees on their willingness to use the new system in doing their assigned work | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 6. We have altered and communicated the job descriptions of all workers who will be affected by the new system | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 7. We have ensured that the way we evaluate performance of the affected employees will take into explicit account the need to use the new system in their day-to-day work | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 8. We have ensured that we have the budget dollars and time to be able to predict the success of the User Preparation Project | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |
| 9. We are comfortable overall that the new system will be used by affected workers to its needed capability after installation | No 1 | 2 | 3 | 4 | 5 | 6 | Yes 7 | |

Compute your score by adding scores for each of 9 scales

(See scoring information on page 6 for interpretation of score)

Total Section One Score

## Section Three: Managing Business Risk

Are we taking the actions needed to ensure that the new system "will make money for the company?"

| Practical Actions | Scale (Select one number on each scale) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| 1. We have a System Implementation Program in place to manage the "timing and fit: of User Preparation and System Delivery | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 2. We have a senior business executive of the firm as the manager of the System Implementation Program | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 3. Our Program Manager is explicitly managing the completion and coordination of both the Delivery and the User Preparation projects | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 4. We have specifically selected the new system based on its alignment with our company's business strategy and macro business processes | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 5. We have specifically selected the new system after analyzing and approving the improved, pro forma business results that the new system's implementation will produce | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 6. We have picked the implementation timeframe to "fit the company's business priorities | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 7. We have documented the business processes that use the new system, showing precisely how the system is to be used | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 8. We have ensured that the business process documentation ahs been communicated and made available to all affected workers | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 9. We have designed a training program to ensure that all employees can "use the new system as a part of one or more business processes that make money for the company | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 10. We have trained and tested all the effected employees in how to use the system as a part of the business process that make money for the company | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 11. We have ensured that we have the budget dollars and time to be able to predict the overall success of the System Implementation Program | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |
| 12. We are comfortable that using the new system in our business processes will "payoff for the company" and its employees | No | | | | | | | Yes |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | |

Compute your score by adding scores fore each of 9 scales

(See scoring information on page 6 for interpretation of score)

Total Section One Score [ ]

# Where are you in Managing Big System Implementation?

**Scoring Instructions**

**Step One:** Add your circled scores for each section of the Assessment

**Step Two:** Write in the section totals in the spaces immediately below; then extend the total by multiplying it by the number inside the box:

| | | | | | | |
|---|---|---|---|---|---|---|
| **Section One: Managing Technical Risk** | _____ | x | 1.33 | = | _____ | Subtotal |
| **Section Two: Managing Organizational Risk** | _____ | x | 1.33 | = | _____ | Subtotal |
| **Section Three: Managing Business Risk** | _____ | x | 1.00 | = | _____ | Subtotal |
| | | | | **Total Score:** | _____ | |

**Step Three:** Identify the Risk Management Area your firm might need to work on by finding the lowest of the three Sections. What might that lowest score tell you about your firm's needed improvement direction?

My firms lowest **Category** of Risk Management is:    _____

Actions my firm might need to take:
_____
_____
_____

**Step Four:** Identify the stand alone Risk Management Actions your firm might need to work on by finding all scores of four below (Pay particular attention to your five lowest scores). Which of these actions might need attention for overall improvement of your firm's capacity for Risk Management?

| My firms five lowest-scored Risk Management Actions: | Needed Actions: |
|---|---|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

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## Scoring Interpretation

Scoring of this Assessment is going to be fun. But who are we kidding? There is no real way to put quantitative standards on an organizational competence as complex as Risk Management. But for those of you who really want to see some numbers, try these:

| Total Score | Levels of Capacity |
|---|---|
| 30 - 66 | **Level One: Everybody Starts Someplace** |
| | Relax! It's not the end of the world (although you can probably see it from your firm's front balcony!). Remember this exercise is about awareness of practical actions that can be taken to get the needed level of Risk Management up and running in your company. |
| 67 - 102 | **Level Two: Room for Risk Management** |
| | Congratulations! You probably told the truth on your Assessment! Clearly your firm is doing some right things as well as some things wrong. Now is the time to go for the low hanging fruit. Pick the five low actions whose improvement might put Risk Management more "in play" in your system implementation. |
| 103 - 138 | **Level Three: Starting to Cover the Bases** |
| | Your company is off to a good start in Risk Management! Sounds like you are covering most of the bases. Find the low points and improve to Levels Four or Five where the fun really begins! |
| 139 - 174 | **Level Four: Covering the Bases** |
| | Look out: all those consultants who help companies conduct benchmarking trips will target your company as one of the places to visit so that they can say, "Been there, seen that strong attempt at Risk Management!" |
| 175 - 210 | **Level Five: World Class and Climbing** |
| | One of three things is likely to happen: the Smithsonian Institute will ask that your company go into a national museum of Risk Management excellence, some psychology professor will ask to study your extremely rose-colored perceptual machinery, or Microsoft will make your firm an offer you cannot refuse! |

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## About Endeavor

Endeavor Management, is an international management consulting firm that collaboratively works with their clients to achieve greater value from their transformational business initiatives. Endeavor serves as a catalyst by providing pragmatic methodologies and industry expertise in Transformational Strategies, Operational Excellence, Organizational Effectiveness, and Transformational Leadership.

Our clients include those responsible for:
- Business Strategy
- Marketing and Brand Strategy
- Operations
- Technology Deployment
- Strategic Human Capital
- Corporate Finance

The firm's 40 year heritage has produced a substantial portfolio of proven methodologies, deep operational insight and broad industry experience.  This experience enables our team to quickly understand the dynamics of client companies and markets.  Endeavor's clients span the globe and are typically leaders in their industry.

Gelb Consulting Group, a wholly owned subsidiary, monitors organizational performance and designs winning marketing strategies.  Gelb helps organizations focus their marketing initiatives by fully understanding customer needs through proven strategic frameworks to guide marketing strategies, build trusted brands, deliver exceptional experiences and launch new products.

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