Ensuring Transformational Success:
Bringing the "A Team"

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Critical and often over-looked components in the overall success of any initiative is IT and business joint partnership and the creation of a balanced project team.

How many times has an IT executive identified new technologies or capabilities that are expected to drive down overall costs and transform the company, only to be met by a collective shrug by business leadership? We have found that most large-scale IT projects that struggle to achieve business case benefit targets and associated adoption are often rooted in the idea that the project will succeed on its technology merits alone—with or without the buy-in from the actual business users.

Companies who undergo IT transformations or attempt enterprise-wide projects with mixed success and marginal long-term adoption must take a step back and view these types of initiatives primarily as **business transformations that are enabled by technology.** Adopting this mindset will lead to much better long-term results. Rather than focusing on the replacement of aging IT infrastructure, a much more compelling conversation to have with business leaders is setting realistic expectations of improved processes, new capabilities, efficiency gains, and financial benefits. Ultimately, we believe that the business (i.e., end users) should lead the transformation while being supported by strong technology and process expertise.

In this point of view, we will discuss why it is critical that transformational success originates with the business, the benefits of investing in the project team in the early stages of the project (and the ramifications of not doing so), as well as outline key factors and characteristics to consider when assembling a strong project team.

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Begin with the Business

All of the cutting-edge "bells and whistles" and many of the accompanying financial benefits of new technology will be hampered or worst case, completely lost without the underlying business processes in place to leverage them. As such, the best resources to design, develop, and implement those processes are the most competent people from within the business. Far too many times, we have seen project teams assembled based primarily on *availability* rather than *capabilities* to drive real results and *credibility* to drive adoption—this results in technology implementations that desperately lack the necessary process and organizational support.
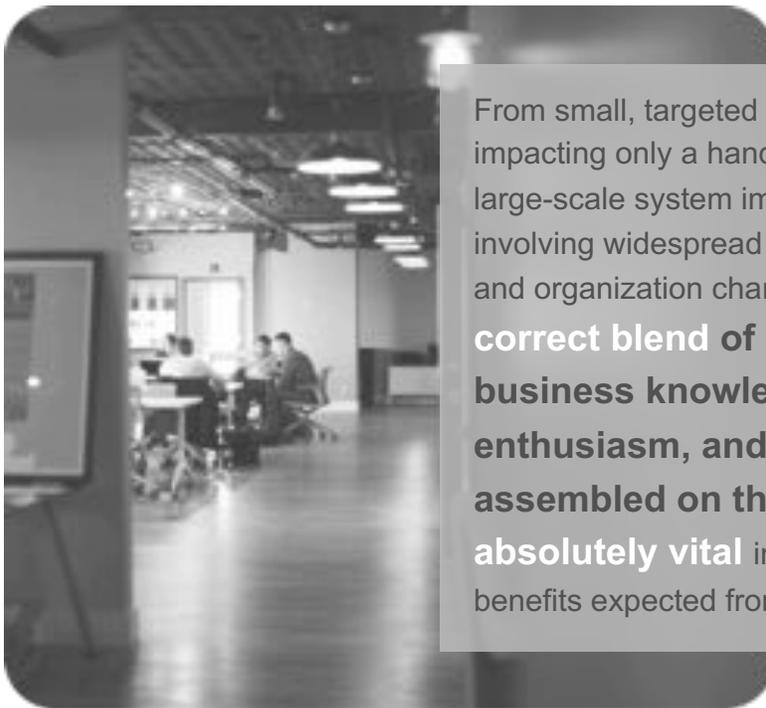
From small, targeted business projects impacting only a handful of departments to large-scale system implementations involving widespread technology, process, and organization change – having the **correct blend of experience, skills, business knowledge, attitude, enthusiasm, and strategic vision assembled on the project team is absolutely vital** in order to achieve the benefits expected from such initiatives.

The Parker Avery Group is often called in to reinvigorate projects that are at risk of failure, and we quickly discover that many of these initiatives have become landing spots for problem children or chronic underperforming associates. In these types of situations, we find that the original project leaders—often recruited from top-level management—tend to delegate a significant portion of project responsibility and decision-making to subordinates who may be viewed as dispensable. Whether it is because they feel the management of tedious, day-to-day project tasks is more suited to a junior associate, or because company leaders only want to be involved in what they perceive as the most

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strategic, business critical decisions, ultimately this type of leadership apathy significantly impacts project success.

Any project comes with substantial investments, not only financial, but also relative to precious resources and time. Typically, prior to the project commencing, a business case is developed, which ideally details the extent of the project investment, the critical business issues to be addressed, and the expected outcomes and benefits. It is often quoted that "Anything worth doing is worth doing *well*." [1] Underpinning this sentiment and given the understanding that a company is willing to invest considerably in a project, it makes absolutely no sense to leave the outcome in the hands of average associates—or worse yet, underperformers. Committing to a team-building strategy that provides far reaching associate development and growth opportunities along with defined pathways to rotate resources into/out of the project over the initiative's lifetime is the prudent approach to maximizing success while leveraging associate skill sets effectively.

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Invest Early or Pay Later

When building the project team, company leadership must understand and embrace a long-term view of the investment. Few, if any, projects are undertaken with only short-term gains in mind. While there may be some quick wins early in the initiative, benefits expected from most project investments are typically months or years in the future. Let's explore some differences in paying "now" vs. "later."

> **Invest Early**. Investing early means making the tough decisions to pull the finest and most experienced staff from the business to work on the project. For

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[1] The first recorded use of this expression is in a letter from Philip Stanhope, 4th Earl of Chesterfield to his son in 1746.

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large-scale system implementations, this typically means **pulling several full-time associates completely from their current positions** for the duration of the project and acknowledging with leadership that doing so creates one or more holes in current business teams that must be filled. Many times, the high performers are excited to lead or participate in an opportunity to build new skills or gain leadership experience.

If resources are not full-time on the project, it can create bandwidth constraints as well as employee fatigue and discontent, which may jeopardize other simultaneous initiatives and/or current business performance.
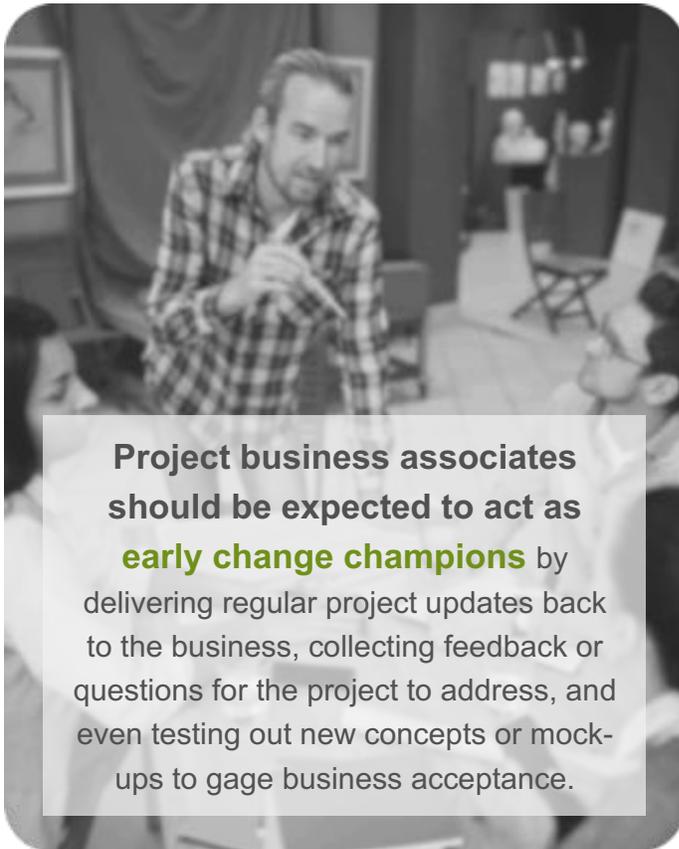
> **Project business associates should be expected to act as early change champions** by delivering regular project updates back to the business, collecting feedback or questions for the project to address, and even testing out new concepts or mock-ups to gage business acceptance.

In order to mitigate some of the risk with leveraging top performers for project participation, we have found that **committing to a personnel transition plan** that circulates business associates through the program over the course of the project leads to several value-added benefits. The longer the program or initiative, the more opportunities there are for rotating resources and creating more advocates for the initiative's future benefit case.

Injecting fresh thinking into the project team or cross-pollinating a "future state" mindset across the organization is the most obvious. While transitioning from operating in a day-to-day work environment into a project mid-stream takes effort from all sides, the simple fact of having a new set of eyes looking at the business issues often leads to removal of previously identified roadblocks.

Further, associates transitioning back into the business **serve as project advocates** by sharing details about the upcoming changes, and more importantly, the expected benefits. They become defacto "adoption leaders" in advance of the actual project going live. We have found that these associates

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are often successfully leveraged by business leadership to translate future state expectations back into the native current state language for the teams.

The final benefit to a structured rotation program is the simple fact that **a coordinated program actually exists and is a legitimate, leader-supported option for career progression**. The existence of real examples for the company to see that people rotating into the project are welcomed back to the business with at a minimum, insider knowledge of future operating plans—or many times with new roles and responsibilities or even a promotion—is a strong selling point when mapping out a staffing strategy. Simply put, having associates willing to invest time and effort on key business initiatives should be valued by any organization, and they should be incentivized and rewarded accordingly.

At Parker Avery, we also believe that project associates from the business should remain co-located with the departments/organizations they are representing on the project. While most major IT infrastructure programs have a dedicated space for the project teams, many times this venue is located in the IT section of the building or campus, separated from the business both physically and consciously. While building a project team's comradery is important, keeping business associates connected to the company has equally important benefits, such as staying in touch with new company issues that could impact design, remaining visible to leaders for adoption concerns, and soliciting feedback on project-based topics or issues. These are all valuable components of successful business participation achieved by having project team members staying close to their new business "clients."

Aside from physical location, project associates should be expected to act as early change champions by delivering regular project updates back to the business, collecting feedback or questions for the project team to address, and even testing out new concepts or mock-ups to gage business acceptance. These associates are a critical component of any initiative's comprehensive change management strategy—from engagement to communication to adoption—and should be leveraged as such. Change management is a vital component of any major transformation initiative and a core competency of The Parker Avery Group.

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Pay Later. Paying later is the opposite approach to investing early, where project responsibilities are treated as additions to existing roles and often given to staff who may not have the required skill set or knowledge to effectively perform the project activities. This mindset essentially has the short-term view of, "Who's available now? Who can we give up and not impact the business?" and the project is often staffed with average performers. This may seem like the "easy" approach, since there is typically a large number of potential candidates from which to choose, and further may seem to minimize impacts on the day-to-day business as these associates are often seen as expendable. For more ambitious associates, such an opportunity can breathe life into a stagnate career, giving them a chance to demonstrate aptitude or build new skills that would otherwise go untapped. However, in addition to impacting bandwidth, because resources are not only stretched thin and often do not have the appropriate experience, this method usually results in process design remediation due to shortsighted or incomplete decisions, as well as missing functionality and/or unseen impacts, both direct and indirect. This can result in a sub-optimal or average solution combined with replication of the current state and missed innovation opportunities. Paying later ultimately means costly software configuration changes, process remediation necessitating increased project investment and time, and a likely delay in benefits realization.

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From an associate development viewpoint, these average performers often get "stuck" on the project for long periods of time, since stronger performers have backfilled their previous roles, resulting in project team members experiencing challenges when attempting to transition back into the business (regardless if a formal rotation program exists or not). This often leads to reduced morale and performance, and most dangerously serves as a warning to other

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associates to reconsider opportunities to join the project for fear of never getting back into the business if that is their desired career path.

Building the "A Team"

You now understand at a high level the implications of investing early versus paying later. Let's take a deeper look at what your "A Teams" need to look like to help bring the most success to your initiatives.

Staff with High Potential. These resources need to be the best and brightest with skill sets most closely aligned to the initiative at stake. Different projects necessitate different experiences, so the careful evaluation of existing capabilities and strengths is critical. For some associates, representing their business unit on a strategic project may be seen as a stretch assignment—a chance to showcase untapped skills and strengthen others. But as mentioned in the "Invest Early" discussion, these associates still need to have the appropriate experience to successfully handle the project tasks from the start.

The different working environment rendered by a special project provides the opportunity to further develop employee skills and possibly even advance within the project team, by virtue of leading or managing others in new ways. It is a good idea to

The "A Team"

Staff with High Potential
Ensure Cross-Functional Representation
Allow Some Skeptics

include active participation on special projects in certain role development plans—doing so sets career advancement expectations and aligns associates' mindsets with the company's strategic initiatives and objectives.

To reiterate, these resources will need to have ample availability to work on the project, often on a full-time basis. Other responsibilities will need to be back-filled for the duration of the initiative, which may create a real or perceived short-term risk to the day-to-day business. However, these impacts can be mitigated through a backfill strategy that carefully considers internal candidates ready for a promotion or lateral move, leveraging

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a strong candidate pipeline, or even re-balancing responsibilities across the remaining team. Since they will be developing ideas and making decisions on behalf of their business unit and the organization, individuals tapped to work on a project must not only have deep knowledge of the company and their industry, but also have the respect and trust from both leadership and their peers.

As mentioned earlier, the company also owes a defined project rotation strategy to these associates to keep them engaged and inject fresh thinking into the project—as well as place project advocates throughout the organization in advance of launch, while also providing opportunities for others to get involved.

Staffing a project with high potential internal candidates results in a more thorough consideration of business needs and current challenges—leading to forward looking, innovative solutions—not simply replicating the current state using a new system.

Ensure Cross-Functional Representation. Choosing a team of exclusively high performers with identical skill sets is not a preferred team structure. Similar thinking "A Team" members can arrive at a reductive solution just as easily as an average team, albeit through different paths, without more diverse viewpoints considered during early vision and design phases. Inclusion of cross-functional experience, either through functional area participation or diverse team member skill sets or backgrounds is a must to ensure that the business issue at hand is viewed through different lenses. These lenses may be characterized by different viewpoints, experiences, or anticipation of forward-looking requirements, and ultimately leads to more robust solutions.

Allow Some Skeptics. Construct your team with a small number of associates who are skeptical to "new" ideas or resistant to change—in a positive way. This may seem counterintuitive to instilling a mindset of innovation and encouraging true business transformation, but in small numbers, project team members who have not completely "sipped the Kool-Aid" can bring good challenges and often ask the tough (but necessary) questions to third-party consultants and vendor system implementation teams, as well as their own colleagues. These skeptics can challenge the project team to think more deeply through solutions and prove the "why." Despite many solution vendors touting "out-of-the-box" systems, these types of implementations are rarely a reality. Skeptics can often serve as a sounding board to help ensure the solution truly meets the requirements of the business, while at the same time taking advantage of new functionality and industry leading practices. Further, these challengers can help improve training materials, align the project communication plan and adoption approach, as well as be early indicators of organizational hurdles that must be addressed.

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However, too much resistance will grind progress to a halt with stubbornness and immoveable positions. When selecting the project team, personalities must absolutely be taken into consideration—a skeptic with an inflexible position can slow down the design process to the point of project gridlock. Proper challenges to project decisions leads to strong design and better insight into adoption needs.

The key to including skeptics is *early involvement*. Engaging critical employees at the onset of the project gives these resources ample time to get comfortable and get on board with the new way of operating yet provide an outlet for their voices and opinions to be heard and considered. Another key element of success lies in the ability of the rest of the project team to effectively address skeptics' challenges and mitigate any negativity to the impending change.

Optimal Team Member Characteristics

What does the "ideal" project team member look like? While this varies slightly depending on the specific project role, below are some key characteristics to consider:

- Demonstrates deep business knowledge
- Embraces change: "new" or "next"
- Innovates in current role
- Adopts technology and process innovation
- Thinks progressively
- Executes ideas effectively
- Exhibits natural leadership capabilities

- Displays natural curiosity
- Demonstrates high potential traits
- Acts as internal "trusted advisor"
- Promotes healthy skepticism
- Communicates "up" and "down" effectively
- Shows willingness to defend positions

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Final Word

Transformational initiatives are difficult. The impact is felt across the organization and affects associates up and down the organizational hierarchy. They are even tougher when the business areas most impacted are not involved early enough in the start-up phase and sponsors rely too heavily on technology by itself to drive adoption and benefit. To achieve success, these transformational projects must be led by the business with strong support from the IT organization in terms of process and technology innovation. The benefits from having a business-led initiative are clear: earlier stakeholder adoption, more intimate insights to the company's strategic needs, and a larger pipeline of high performing business resources to choose from when constructing the project team.

Regardless of project size, when assembling a project team, there are a few core themes that should be followed. Taking a long-term view of the investment involves working through the day-to-day impact of committing high-performers to the effort; this includes adopting a rotational program to keep the team members fresh, leveraging business liaison role expectations that allow associates to influence their business network, and rewarding people who invest time and effort on behalf of the organization.

Including sufficient cross-functional representation for the project scope and incorporating healthy skepticism, as well as other essential characteristics and business competencies all helps to ensure that solutions are thoroughly designed and consider numerous perspectives and broad stakeholder needs. Maintaining a "business led" approach enables company leadership to effectively demonstrate that the initiative has merit, the quality and depth of the final solution will deliver functionality and transformational change that solves important business issues, and ultimately the project will achieve benefits that meet or exceed the business case.

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The Parker Avery Group

The Parker Avery Group is a boutique strategy and management consulting firm that is a trusted advisor to leading retail brands. We combine practical industry experience with proven consulting methodology to deliver measurable results. We specialize in merchandising, supply chain and the omnichannel business model, integrating customer insights and the digital retail experience with strategy and operational improvements. Parker Avery helps clients develop enhanced business strategies, design improved processes and execute global business models.

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