The Problem

A utility decided to implement SAP as a change to their Enterprise Resource Planning (ERP) System. We were asked to lead the design, training and implementation of the Project Portfolio Management (PPM) components as well as the associated integrations with other process areas.

An IT Product is not the System

The three core stream leads of PPM, Finance, and Supply Chain were instructed to listen to the SAP technical experts and tweak what they determined was the best system for us. The executives were adamant that we would deliver the SAP best solution.

We got together and the first question I asked was why? Why were we implementing this system? What was the problem that this solved? What was the opportunity that this system allowed us to take advantage of.

The response I got was laughter. The best I could understand was that the problem we were solving was not having SAP implemented. The technical teams were in charge and driving for a technical solution.

As is often the case, I took the stream leads into a room with a whiteboard and we drew out the basic value stream of the business. We didn't draw SAP. We drew the information and the controls that showed the things that allowed the business to deliver to customers.

We had put together the systems of people, process and information that mattered to the organisation. This was the system we needed to make sure was in place. The system that would be supported by the IT product.

Design for the user, not the designer

Once we had this transcribed into *Visio* as an *information network map* we shared this with the key teams that used the existing ERP and who would be the most affected by the new implementation. They helped us add and alter our diagram with additional detail that only users could provide.

From this we were able to collect the descriptions of what was needed in terms of individual *User Stories* that gave specific scenarios of what the business needed under each scenario and what would be *Nice to Have*.

Integration points were captured and the PPM stream was identified as the key area where integration could be managed to best inform the design of Governance Risk and Compliance (GRC) that formed the core hierarchy of decision authority.

The project came to a premature close due to external concerns with project governance. It was a source of pride that the only stream that was determined as sufficiently developed and generally applicable once the project recommenced was the PPM stream. We provided a 78 page document that described the business blueprint of processes, controls, and reasons for decisions for business requirements that was the basis for functional and system design.

Our Conclusion

It is a common misconception that when implementing a new IT solution the business must accept that as their new operating model, not just an operating system. In truth the operating model that provides the outcomes and benefits for customers and business stakeholders alike is the system of people processes and information that the IT system is designed to support. The gap in many solution implementations, that was overcome in this one, is the lack of a business lead with the authority to make business process decisions. There are times when there must be concessions made with respect to business process in order to get best value from an ERP. Best value though comes from understanding first the business process and the outcomes they produce so that the consequence of those concessions are able to be managed. To be a process led business you need the process to drive the IT not the other way around!

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