



Professional Issues  
*An exercise in planning and risk*



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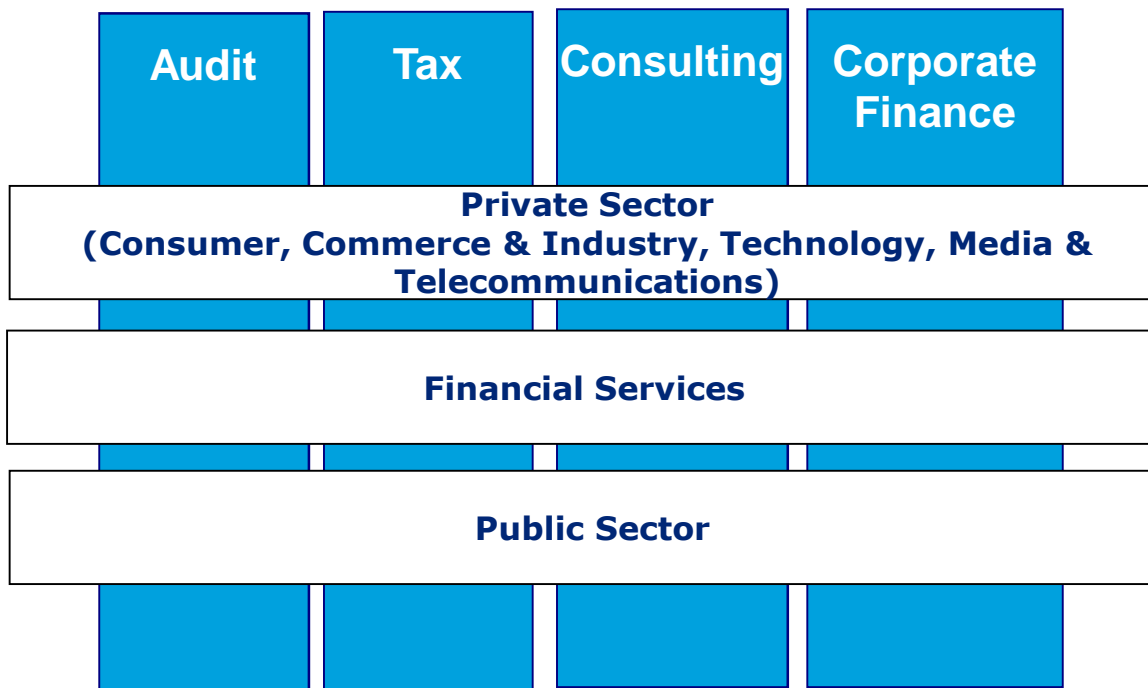
# My Background

- B.Eng (Hons), MSc., PhD (Edim)
- Last time in Appleton Tower Lecture theatre was 1987
- Career History
  - Research Fellow at Edinburgh
  - Enterprise Architect for a UK Bank
  - Deloitte

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- The company and project covered in this presentation is fictional, and any similarity to any company or project is unintentional and coincidental.
- No animals were harmed in the making of this presentation.



# The Client

- Internal Audit
- Small organisation, lots of history, personal relationships
- New Chief Executive in place
- IT Department perceived to be under-performing
- Undertones – Give us the evidence to fire Head of IT



## The Brief

- Work with us to create a 5-year IT Roadmap with costs
- Oh, and can you cast your eye over Annual planning round projects
- (and give us the evidence to fire Head of IT)



# The Annual Planning Round

# The Annual Planning Round

- Proposed projects all align with the strategic plan
- Projects are in various stages of design and range from solid, actionable plans to aspirational improvement
- Submissions ranged from multi-page business cases to single sentences
- Limited budget
- Politics inevitably becomes involved





# Assessment Framework

The assessment framework has two elements: the case for each project in isolation and the combined, portfolio, impact on the financial and service levels of the client

## Project Assessment

Each project will be assessed in isolation to determine the strength of the business case and opportunities for synergy with other projects, or institutions.

## Portfolio Assessment

The project portfolio will also be mapped to the Deloitte Value Map to assess the combined, portfolio, impact on the financial and service levels of client.

## Simple Evaluation framework

- **Cost reduction:** project will lead to a tangible, realisable reduction in operating cost
- **Income generation:** project will lead to a measurable increase in income
- **Risk reduction:** project will reduce exposure to an identified risk
- **Service enhancement:** project will create an improvement to service, or extension to range of services offered

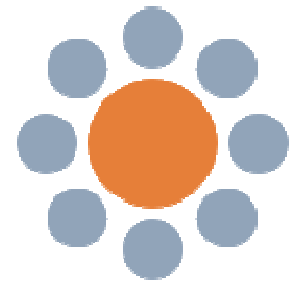
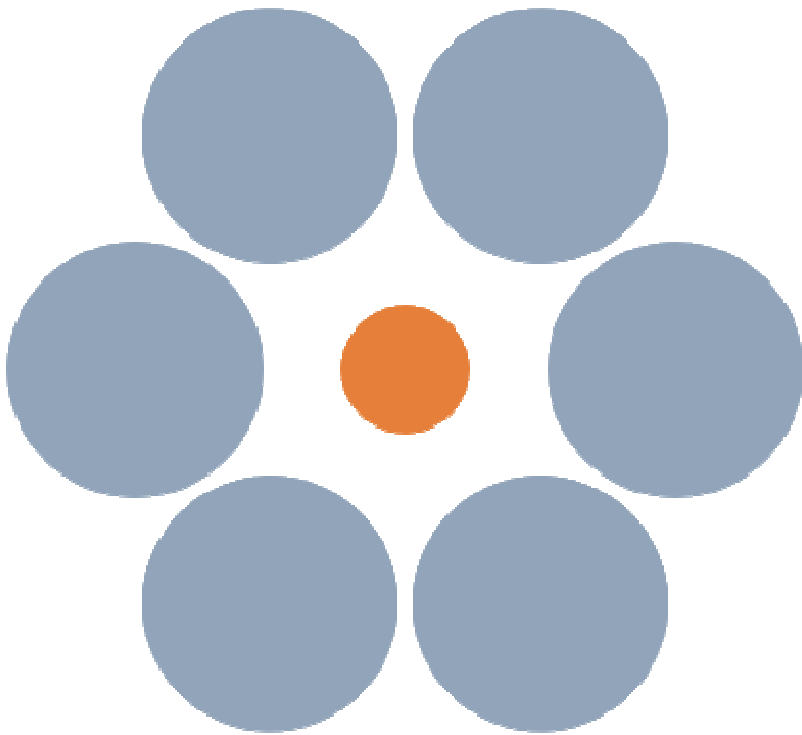
## So...

- Create an evaluation framework
- Interview **all** submitters on their requests
- Clarity of understanding of change
- Strength/certainty of numbers
- Challenge!
- Plot on framework

## Impact

- Decreased the politics and removed “headline grabbing” bonus of projects
- Allowed discussions on the balance of service improvement against cost reduction
- Left a clearer framework for next year’s round

Bring me  
The Head of IT



## Back to politics and perceptions

- “Perception is reality”
- Perceptions
- IT is stable but...
  - Not providing good user service
  - Not a strategic thinker
  - Not a leader
- Suggestion of a public and private report
- **Danger, Will Robinson!**

## Collective reality

- Interviewed all senior stakeholders plus others
- Looked for causes rather than blame
- Analysed objective data – help desk logs etc.
- Results:
  - No performance measures in place
  - No communication channels
  - No job description
  - Providing higher levels of service for budget than equivalent organisations



## Messages back to sponsor

- How do you know the Head of IT is not performing when you've no measures?
- How can you say that he's not strategic when you've not asked him to be
- You're not doing your job!
- Given that the sponsor is paying the bill, this needs to be sensitively handled!

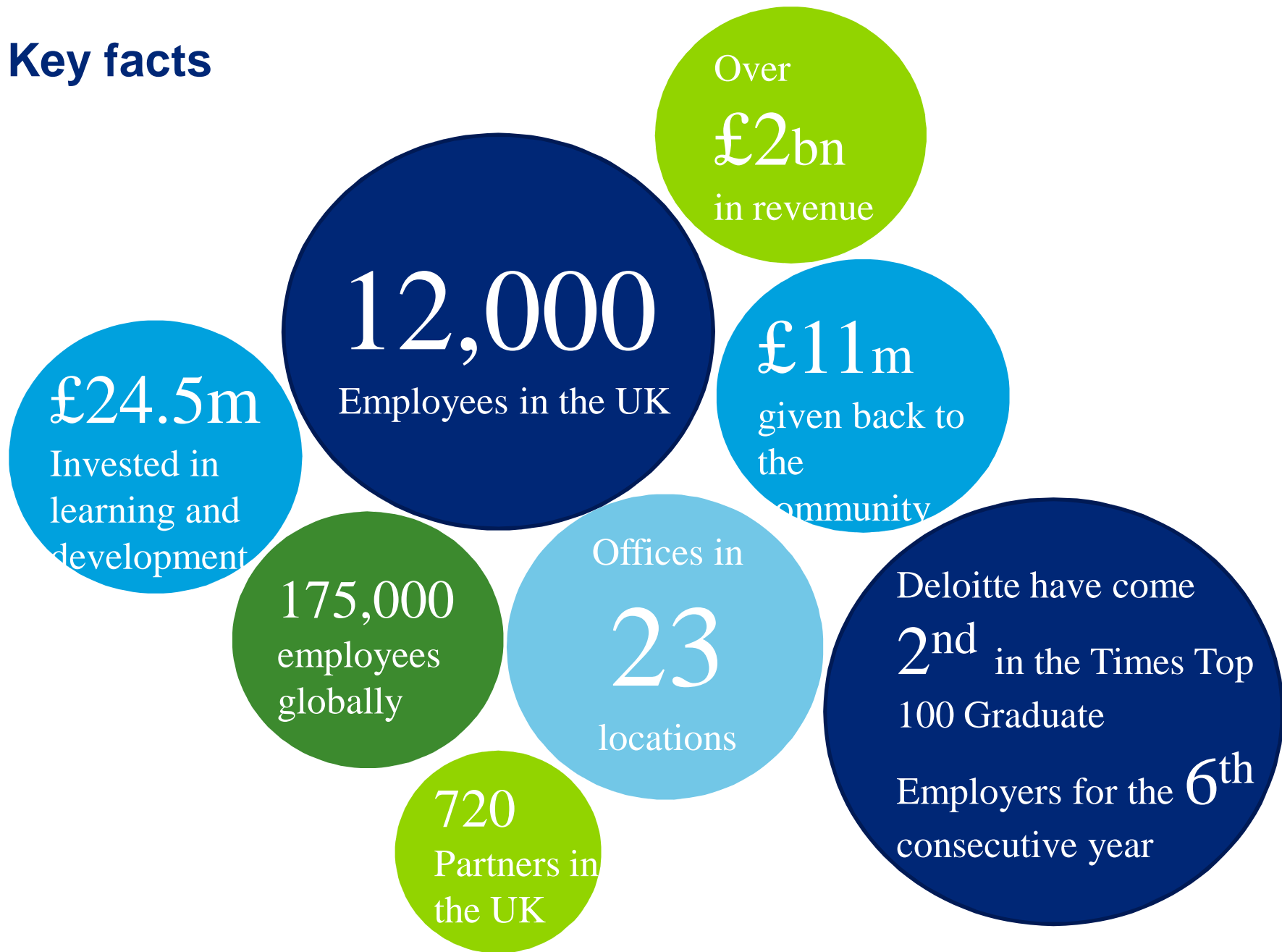
## Summary

- It's hard to avoid politics and people
- You can't avoid risk
- Everyone has their own agenda
- (even you!)
- People can argue with interpretation but not with facts
- Messages need to be delivered sensitively to be effective

Questions?

Get in touch

## Key facts



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Thank you for your time

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