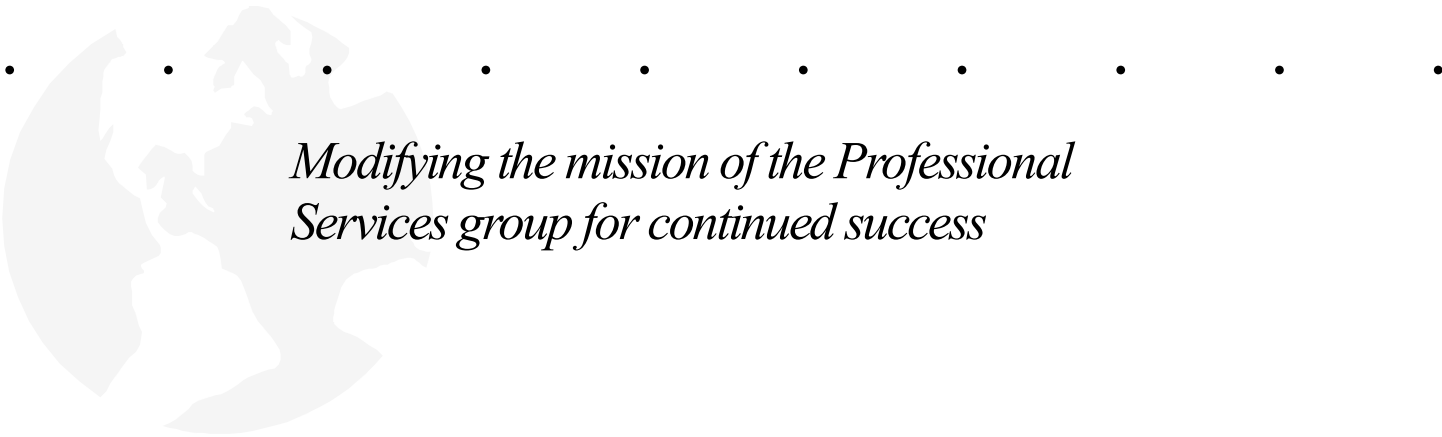


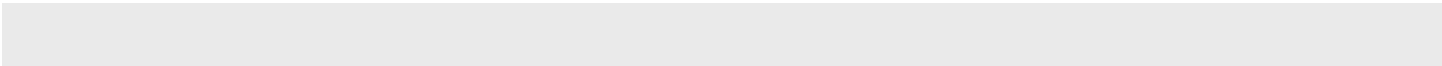
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East Region Organizational Ideas



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*Modifying the mission of the Professional
Services group for continued success*



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Teams vs. SME's

Easier to manage, increased odds of success

Current Situation

The original charter of the East Region Professional Services (ERPS) group was to assist sales branches in the activation and deployment of large service engagements. Along the way the ERPS was tasked with educating the branch personnel, hopefully making them less dependant over time. It is the consensus opinion of the ERPS that this has not, nor ever will occur in the present scenario. There is simply too much other work and too much turnover at the branch locations to make this happen under the current Subject Matter Expert (SME) structure.

A single SME placed at an account has a number of obstacles to overcome:

- Specialization in a service silo is counterintuitive to the integrated services approach
- The branch is often unable to match the SME with local resources possessing complimentary skills
- The SME is totally dependant on the branch resources for project completion but is often viewed as the reason for the project's success/failure
- The branch often relies on the SME to lead the project vs. support it due to lack of qualified resources
- The simultaneous objectives of teacher/doer are counterproductive

A military analogy will serve to illustrate the point. Early in the 20th century, the armored tank was developed to overcome recent advances in infantry warfare (namely the machine gun). It was thought that by distributing the tanks piecemeal in support of the infantry (i.e. a pure support function), their singular weight would allow the infantry to take the opposing trenches. Experience proved that this "SME" approach was unsuccessful and the trench stalemate continued largely unchanged until economic factors ended the war. The tank's reputation, not living up to the hype, bore the moniker of an unsuccessful experiment by most of the countries that deployed them.

Proposed Changes

Clearly an alternative approach to Regional support must be devised in order to fulfill the dual mission it was created for. Pervading opinion champions the idea of simultaneously strengthening a number of the aspects of Regional operations:

- Widen the focus of SME expertise to include all services (generalist approach)
- Separate delivery from knowledge transfer
- Deploy cross-functional teams instead of individual SME's
- Accept and plan for the reality that the Region will sometimes spearhead customer engagements with branch support vs. always the opposite.
- Integrate Activation/Transition into the overall process of Solution Design

Generalist Consultants

Given the ever changing make-up of branch personnel, it is unwise to count on them always having the right skill mix to “fill in the gaps” on a project. It would be much more productive if the ERPS were made up of individuals cross-trained in all aspects of delivery. This way, whatever the branch has to offer, the ERPS will have the proper and complete skill set in any project team.

Naturally Regional staffers can “specialize” in a service discipline depending on individual interests, but it should be subordinate to an overall understanding of integrated service delivery. An analogy would be the college major/minor approach. Integrated Service Delivery would be the major. Service “X” would be the minor.

Accepting Reality – Support vs. Lead

Learning from history, when the ERPS gets involved in a project, it is very easy for the branch to abdicate responsibility, moving the burden of success/failure to the Regional SME. As described in the opening section of this document, the branch often does not have the skill set or bodies available to execute on some of their successful bids. Unfortunately this leaves the Regional SME in a position of full responsibility and no authority.

It is proposed that management slightly modify the mission of the ERPS and the mindset of the branches towards a culture that accepts the fact that the Region will occasionally take the operational lead (along with the responsibility) for certain projects. In these cases the owning branch provides support to the Region vs. the other way around. This would most likely occur for national accounts, but could happen any time management thinks a Regional focus would benefit the project.

Activation/Transition

The natural result of a successful pre-sales engagement is account activation. While the cross-functional teams essentially build a steady-state solution, the activation specialists take that construct as an end goal and build a road towards it following the (customized) Activation Plan. These resources are essentially project managers with some creative vision. They must work hand in hand with the pre-sales solution teams but can also operate individually after those teams have disengaged. They would assume temporary command of the owning branch's activation resources (the assumption here is that a branch has to at least be able to staff up to an engagement it wins. Activation ends when the Transition manager hands over the reigns to the designated Project Executive.

Separate Implementation and Knowledge Transfer

Doing one thing extremely well as opposed to doing many things just OK is a well-understood concept. Without knowledge transfer the ERPS will never make the branches better at what they do. Unfortunately the bandwidth to do this at the Region is lacking. While

it could be argued that project work is always the highest priority, displacing branch training has a penny-wise pound-foolish long-term effect. The proper analogy is that of running in place. The ERPS keeps re-inventing the wheel or having to step in at the branches because resources were rushed off to the next project before having had the opportunity to properly de-brief and learn from the experience.

A classic example is the Continuous Improvement Study at HLR. Who in the East Region has the knowledge on how to conduct a gap analysis besides those resources that executed it? How many of the recommendations were acted on? Where was the knowledge transfer or branch/site involvement to “carry the torch”? Who will get called upon to do the next CI study?

The ERPS is not advocating the organizational separation of the people who deliver services from those who train. But rather instead to formalize and separate the time allocated to both activities so that training becomes a natural extension of implementation. This can be accomplished with a slight change in organization, which is detailed in the next section.

Self-Sufficient Teams

In order to make the above arguments a reality, the ERPS is proposing a modification in how the Regional staff is deployed. Rather than individually dispersed among the branch troops, the suggestion is to build teams consisting of 2 general consultants whose skills cover the complete spectrum of delivered services. This would include Central, Desktop and Acquisition Services. The team lead would further be responsible for the output of the group, which is the overall solution design. It is also suggest that either the Branch Project Manager or the Regional Transition Mgr become the ad-hoc third member of this implementation team as each project warrants. Aggregating the preliminary SOW would be their primary responsibility.

Taking this a step further, with multiple teams, management could continually rotate one of them out of the “front lines” to transfer knowledge from their most recent engagement to the branches.

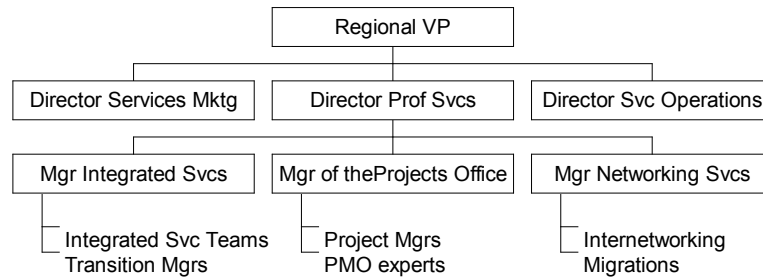
This accomplishes a number of objectives:

- Always having critical mass on a project when the branch does not have the available skill sets to “fill in the blanks” since there won’t be any with self-sufficient teams.
- The issue of responsibility vs. authority is negated since the team can theoretically complete the project on its own if necessary.
- Conversely, assuming the branch does have resources, the team is skill set complete and won’t need to rely on the branch for the success of the project.
- The integration of Transition/Migration into the process from pre-sales through handoff to operations (including the creation of the SOW).
- With multiple teams, R&R becomes a reality and knowledge transfer can be formalized. Of course, there must be at least two teams to make this happen. Burnout would be less of an issue if members can look forward to a period of post-mortem assessments, documentation of lessons learned and associated knowledge transfer.
- Focusing 3 to 5 teams on specific projects is much easier to manage than accounting for the whereabouts of 9 to 15 individual consultants as is currently the case.

Continuing the military analogy: The proper use of the tank turned out to be grouping it en masse to achieve a single (or series of single) objective(s) with the infantry following up to hold the ground taken by the armor. When a front line unit has achieved a breakthrough and secures the victory, it is pulled from the line for refitting to prepare for the next campaign. This cross-functional approach is still in use today. Now utilized as a primary means of achieving an objective vs. operating in a pure support role, the tank's success is measurable and its reputation forever secure.

Organization

Proposed Regional Organization



At present there is more need for ERPS services than people to fulfill it. Unless the Region are ever going to staff ahead of revenue it is suggested they organize around this need with as few vertical barriers as possible.

Integrated Services is the preparation for steady state and transition to Svc Operations. Networking services is pure technical project work. The Projects Office serves as a support function to both sister groups and also the branches in need of generic project mgmt.

Note that all three groups are implementation focused. With respect to Integrated Services, this could be implementing a previously sold outsourcing engagement, converting a body shop to a per seat account or “implementing” a preliminary SOW and solution design in pre-sales mode if the situation warrants it. There is some overlap at present with Services Marketing which would need to be further defined (possibly allowing them to re-focus on Marketing and pricing *review*, rather than pre-sales solution design).

Summary

The suggestions contained in this document can be implemented without making changes to the presently blessed Regional organizational structure. Instead the focus is on modifying how the relevant resources are deployed and managed. This is more evolution based on lessons learned than it is revolution. If given the nod, the ERPS would eagerly take on the challenge of molding the Integrated Services group into the future state proposed in this document.