

# Avoid seeing Domino Effects in your Projects

## The Business Challenge

Without proper planning, projects go awry—overbudget, out of scope, off schedule—leading to domino effects in your projects.

While everyone appreciates a team member that dives head first into a project, in the long run, it is smarter to pause and plan the project prior to starting. With a plan in place and one that holds all contributors accountable, projects are more likely to be completed and done within the project's constraints.

A project charter will highlight the business need, and your business requirements will drive the changes. Gathering business requirements is necessary because it is the formal agreement between the client/end-users, the business owner/stakeholder and the project manager. Project charters state exactly what will and will not be included in a project and what the end-user can expect once the project is completed.

Having a project manager that focuses on managing the process and status of the project allows your stakeholders and contributors to focus on the tasks within the project plan.

*Project plans ensure everyone is on the same page and working efficiently towards the common goal.*

## Top 10 Things to Consider for Every Project

- The Problem
- Existing Processes
- Contributors
- Participants
- Key Stakeholders
- Approval Process
- Technical Specs
- Implementation
- Constraints (i.e. budget)
- Risks and Assumptions

## The Approach

Our Subject Matter Experts have identified key steps when creating business requirements and project plans. The below steps ensure that you are considering all of the top 10 items listed on the previous page.

- When discussing business process, you must first ask yourself what are you trying to solve.
- Does an existing process exist?
  - If yes, is the process already mapped out and where is it located? If not mapped, you must learn and map out the existing process. In most cases, this would be with someone who has familiarity or considered a Subject Matter Expert.
  - If no, create new process from scratch.
- Identify the key participants to contribute to the new or updated process.
- Walk through the steps and identify any potential changes to existing process.
  - While discussing the steps, business requirements are identified. These requirements could be as simple as making sure it works the same to the end user, changes they would like to see (both functional and maybe technical), or just how they would expect to go. The business process lead should be documenting these requirements.
- Review process with key stakeholders.
- Receive approval from leadership to proceed.
- Complete functional/technical specs.
  - Business requirements could require technical changes. Some companies have another level where functional requirements are documented (to support business requirements). Some have technical requirements, where applicable. Some have both levels and some have just one. The functional/technical requirements or specs give more detailed technical specifications on the changes.
- Perform Testing, Technical Implementation, and Training to impacted business units.

## The Business Value

The business value delivered by undertaking a project depends how the project is planned, executed, and implemented. A great example of how SME has guided clients through major project is from one of our energy and utility clients. SME worked closely with the company and utilized project charters and project managers to complete the project on time and within budget.

To achieve the goal of cutting costs, electric providers implement Remote Connect/Disconnect (RCD) capabilities for their meters to alleviate the cost of having Meter Techs visit the physical location every time a residence turned over. In this use case, the company already had existing (yet inefficient) and well documented processes for "Move In/Out". Following the above approach, the existing processes were reviewed and used as the starting point for the project charter. From there, the key stakeholders were identified and participated in four workshops.

While going through the existing process, the business design highlighted where RCD would change the process. Instead of sending a Meter Tech out to "Boot" (block the meter) or "Unboot", those capabilities could come over the air via radio transmission signals.

Where those changes were highlighted, the business stated what they were hoping to get out of the new functionality. They wanted many of their internal processes to remain unchanged or minor changes to reduce impacts to their call center agents and other staff members who utilize the process. With that being said, those business requirements led to creating functional requirements and ultimately technical changes.

## Next Steps

SME's consultants operationalize companies' existing data providing a true and real-time evaluation of their current business landscape. Reach out to [Info@smesgroup.com](mailto:Info@smesgroup.com) to learn about this use and others.



Our deep rooted understanding of business operations gives us a competitive advantage; this knowledge is passed on to you.

Reach us at [info@smesgroup.com](mailto:info@smesgroup.com) or (813) 414-5669.