

PM WORLD TODAY – PM ADVISORY – MAY 2009

## Client Management in IT projects

*Best practices in the project scope definition for better client satisfaction*

*By Alessandro Bolloni, PMP*

In these days of economic downturn, companies seek to reduce their financial exposure investing capitals on a limited, carefully selected number of high priority projects. In this harsh context, the challenge for Project Managers is to deliver successful projects relying not only on technical skills; they have to demonstrate real talent and leadership as these are the key success factors making the difference nowadays.

From a project management perspective, each project phase requires a great deal of communication and leadership and the initial phase, encompassing both the project conception and the client requirements definition, is the most critical as the inevitable outcome of requirements errors is unhappy customer, time consuming and costly rework, and potentially business failure. Therein lays the need for improving the approach to define project requirements through the adoption of best practices, aiming at improving the chances of business success reducing rework and improving delivery time and quality.

### **What is project success?**

The responsibility generally attributed to a project manager usually implies focusing on a very specific domain, framed by the project scope, and having as a sole objective the realization of the desired product and the release of deliverables to the client for the agreed use. Does this encounter client satisfaction? Not always and for sure it doesn't guarantee the expected outcome. Especially in the IT domain, a project is an endeavor to meet specific business objectives, such as increase of market shares or retain customers being lured by churn to competitors. Usually all these business-related aspects are not under the Project Manager domain.

In certain companies the Project Manager is not even aware of the benefits the project should deliver, and too frequently paramount concepts like Business Case or Return on Investments are unknown to the Project Manager. Therefore the question to be answered is how the Project Manager can steer his project and how can he present a complete and objective project status to decision makers (such as Vice Presidents), without having a 360° view of his endeavor? The answer is easy: he cannot, and what's worst nobody else can do and the PM is still being considered accountable and responsible for any project outcome. Although the Project Manager involvement in non-technical matters is mostly driven by the Company culture, his perspective should widen, encompassing business aspects as well, for the figure of the Project Manager cannot be just that of a doer or that of a subject matter expert speaking technical language only.

The maturation of such extra-skills in form of best practices is the result of constant interaction with business stakeholders, and can dramatically increase the project chances of success. One of the mentioned best practices is the definition of Business Requirements adopting an iterative approach instead of the classical waterfall. The change in paradigm is that the project management objective should not be the sole implementation and delivery of the project objectives, instead it should be the achievement of the end business objectives.

This implies a change of mentality as well as a change of language. In order to deliver a successful project the Project Manager has to think in a similar way as his Client, he has to speak his business language and that of other business stakeholders, and finally the PM has to understand his client grasping his concerns, his priorities, his long term strategies.

When the Project Manager is able to enrich his hard technical skills with business skills, then he becomes a real partner for client success and not just a service provider.

### **Understand the project concept and the client objectives**

In every Project Manager career a number of projects (hopefully just a few) suffered some trouble due to the fact that Project Client expectations were not fully met. Certainly the project success resides in the partnership that Project Manager and his client are able to establish, and on their joint ability to construct together a framework of Business Requirements that are clear, complete, and uniquely describing the client wishes. Certainly the Business Analyst plays his usual active role, the concept being stressed here is that the Project Manager is part of the process leading to the Business Requirement. He is a trusted advisor providing all recommendations, suggestions, experience necessary to avoid fuzzy requirements and to avoid incoherent product design, otherwise, even in the best scenario, additional reworks and waste of time and money are required for corrections; in the worst scenario deliverables could not respond at least partially to client needs and usually this is discovered during acceptance phase right before the project launch. The maturity toward a partnership relationship implies considering either project success or failure as either parties success or failure and not just of one party (especially failure being attributed to the Project Manager 90% of the time).

Every Project Manager recognizes that a certain amount of fuzziness in Business Requirements remains no matter how much efforts are spent in the business requirement phase. Certainly this is true but that percentage can be reduced significantly. In fact, the Project Client knows what he wants in terms of Business objectives to be achieved, and usually the project concept is supported by technical consideration based on the Project Client experience. However, as the technical implications are outside the Project Client domain, it is the role of the Project Manager to suggest recommendations on "how" such business objectives can be achieved. These recommendations should encompass financial considerations through the elaboration of a Business Case (to be refined as more accurate figures become available), they should take into proper account the company's strategy for

the IT architecture evolution, any technological constraints and all prospective risks. All these considerations will however be meaningless without keeping in mind that the Business objective is the main target. What's the probability of success of a project that responds to technical consideration in the optimum way but doesn't deliver the expected business results? Other way round, could a project be considered successful if it achieves the business objective at the expenses of an IT architecture resulting non scalable, or unstable, or that will require later rework to be considered acceptable?

The key step any Project Manager should do to increase dramatically the chances of project success is to get involved in the early stages of the project, when the concept is being elaborated. This is the project phase where the Project Manager's amount of experience and knowledge could significantly influence the subsequent phases. For example, in case of Marketing-driven project the Project Manager should act as an advisor stepping in from the Marketing survey, even before the project concept is elaborated. In this phase the Project Manager has to understand whether the objective is to counterbalance competitor's move, or to acquire new customers, or to increase the ARPU, then providing technological advice on how to best achieve such objectives. Certainly for purely technological project the advisor role could results more natural being in the usual Project Manager battle-field, nevertheless the general principle of the advisor role doesn't change.

Elaborating advices generally requires the involvement of a Business Analyst and maybe of the Technical experts that later on will be part of the project team. When this happens, the relationship between the Project Client and the Project Manager is enforced, the two becomes trusted partners working at the same common objective.

### **Iterations in the collection requirement process**

Usually the Business Requirements collection phase is regarded as having a well defined duration and being distinct from the system analysis. It is certainly true that such two phases are different and sequential; nevertheless the formal boundaries that traditionally put them aside should be less strictly regarded. In other words, well conceived Business Requirements are the natural result of an iterative process where all Stakeholders, both Business and Technical including Quality Assurance and Operations, discuss the preliminary requirements exploring the possible scenarios and uses cases. This multi disciplinary convergent approach funnels the elaboration of the overall project scope taking into account all Business needs and dependencies, solving ambiguities and gaps, identifying missing requirements and prioritizing all those identified. This process should be repeated on a regular basis to reconsider the identified business requirements and their priorities and to include a revision of the architecture design to evaluate the technical implementation, the identified constraints and the technical opportunities to exploit.

Usually the iterative approach doesn't require more time than the traditional waterfall approach in which business stakeholders and technical experts are working separately and their only connections are the Project Manager and the Business Analysts. Certainly the new paradigm requires more effort and commitment to actively participate to the recurring

explorations, however the benefits are immediately tangible and they provide to the Project Client the needed confidence and visibility. Further, the analysis is anticipated somehow, thus the proper system analysis, or feasibility study, should require less time than usual as the business expectations are clearly set and already pre-analyzed.

For a Project Manager it is paramount to reach the performing stage of the team development as soon as possible gaining the respect from all the project participants demonstrating sound leadership. Iterating the early project stages provides Business Stakeholders and Technical with confidence by working together, pre-existent frictions are solved and the mutual respect is matured putting together energies and competencies. When this is achieved, the Project Manager becomes a key success factor being consulted and constantly involved in any project activity, especially when existing political dynamics need to be positively influenced for the project success.

### **Business Requirements specification**

On practical grounds, the first step in the Business Requirements specification is to define the business objectives to be achieved, the product concept and its market positioning. The concept encompasses the entire product lifecycle, including prospective evolutions as well as the market positioning versus competitors. The requirements collection phase should start by a sheer understanding of the product vision by both Business Stakeholders and Technical teams.

The process aimed at removing misunderstanding and gray zones and at defining a well framed scope perimeter include the analysis of the marketing survey with a preliminary technical assessment via a SWOT analysis of the concept, identifying risks, dependencies and synergies to exploit. Also, this preliminary analysis allows a high level cost assessment needed to initiate the analysis of the Return on Investment via the Business Case.

During the preliminary revision of the product concept it is best practice to involve other business stakeholders in the loop. In fact, any project has a number of impacts both on technology or on internal business processes, thus it is essential to gain commitment from all those being interested by the initiative as they will present their own requirements either to evolve the status quo or ensure the as-is. This cross functional revision is not just aimed at collecting Business Requirements, it also serves to acquire different point of views, the different customer perspectives and even preliminary use cases.

These preliminary briefings allow the Project Manager to understand how critical the project is for the company, and what's the most suitable governance and communication plan to put in place in order to provide timely and relevant information to decision-makers to receive the needed support along the course of his endeavor. This could result in defining a number of committees encompassing a Steering Committee involving Vice Presidents and/or the Project Progress Committee involving management lines for more operational support.

Then, recurring iterations will serve to explore all possible user scenarios, to evaluate alternatives and to prioritize requirements to cope with the existing constraints. All these actions are only possible with the active participation of all the relevant stakeholders as the objective is to balance the customer value of the product with cost, time and risks.

Going through the requirements recursively is key in refining those vaguely defined or those that could be subject to interpretations. Ambiguities should be solved before moving on to the system analysis in order to avoid delivering something the Project Client doesn't want. This could be read as obvious, instead it occurs very often and even with senior teams. A very easy trick to limit such event is to define a glossary for all the keywords used along the project, even for those that look self explanatory. For example, how the boundary between Business Requirements and System Analysis is defined?

The iterative approach also helps in revising the product architecture, including required performances and operability requirements, the acceptance criteria and an embryonic Quality Assurance Strategy to be refined later on. This last aspect should not be overlooked, in fact in special situation (don't forget a project is a unique endeavor by definition) the inability or the ineffectiveness of a testing procedure could suggest changing the product design or even specific requirements.

Moreover, the constraints, the assumptions and the risks and suitable risk responses need constant revision in order to have an up-to-date snapshot of the entire project status and context.

Good business requirements are also written not just to describe the desired product, but also to be easily traced into the design, the coding and the test. When this link is smartly established, the identification of a source issue can be quickly and easily traced.

The iterative approach doesn't abstract from a structured and organized methodology in capturing Business Requirements, after a number of iterations the concept and scope are pretty clear, a formal approval stage to freeze Business Requirements need to take place to initiate formally the proper system analysis to evaluate the implementation efforts.

## About the Author:



### Alessandro Bolloni

Author



**Alessandro Bolloni** is a Senior Project Manager with 8 years of experience matured in large international, multi-ethnic organizations in the mobile telephony industry. His experience spans from big IT transformation projects focusing in particular on Convergent Billing, Charging Systems and CRM, as well as in organisational transformation via outsourcing/offshoring. In these various contexts he gained his reputation as inspirational leader motivated by excellence and result-orientation in achieving challenging objectives.

Alessandro published a number of articles on Project Management-related topics such as Risk Management, People Management and Leadership.

He is PMP since 2005 and is a fellow of PMI North Italy Chapter.

Alessandro Bolloni can be contacted at [alessandro.bolloni@gmail.com](mailto:alessandro.bolloni@gmail.com).