



SOFTWARE IMPLEMENTATION GUIDES

Business Discovery Series

Business Fitness Self-Assessment

Independently assess your own business fitness, prior to contacting a third party.

Make a start on self-assessing your business.

Prior to engaging in a new software or business project you need to assess your suitability to begin that project. Investigating how well you know your own company infrastructure and importantly how well organised and documented that knowledge and structure is.

- Clarity of, and access to your company's infrastructure, provides a solid foundation for the project. When you're inevitably asked to provide information, you immediately have it to hand.

Information documented and easily accessible.



- Divide up your business into its component parts, and assess the state of each one.

Areas for analysis.



- People, Roles, Responsibility.
- Business Structure.
- Departments/Heirarchy.
- Workflows Mapped.
- Electronic Data.
- Current Software in use.
- Specific Customer and Supplier Requirements.
- Documentation.
- Compliance & Accreditations.
- Reporting.

Example Component Parts.



- You'll need people in your business to take time out from their usual work to complete this project.

Resource Requirements.



- This will depend on the current state of your information as well as the size and complexity of your company.

How long will this take?



Get Talking!

You'll likely need to involve most people in your business if you want to do this properly. You need to discuss the business overall, and then dive into its structure and processes in detail. Here's the typical involvement you'll need from the different people.

Senior Leadership Team (SLT)

The SLT are responsible for driving the project forward, they can nominate a manager to carry out the discovery. It must be someone with a good standing within the business, and importantly, someone that is well liked by everyone.

Managers

Managers should know the all information for their department/team, though often only at a high level of detail.

Team Leads

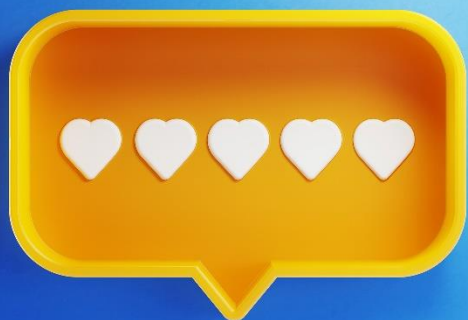
Team Leaders can usually provide more detail on individual processes. Meetings should be conducted away from managers.

Everyone Else

Yes, everyone else. Most process exceptions are discovered with the people who actually carry out the business processes day to day, so don't skip them.

Questioning Techniques!

The key here is to get people to be completely open about what they do and how they do it, you want the full picture, not the sugar-coated version!



Communicate Openly about why you're doing this and that you'll share the results with them once complete.

A Friendly Demeanor – People generally don't like being asked to show you what they do at work. Be friendly and gentle, reassuring people you're trying to understand how the business works, not scrutinizing them as an individual.

Conversational and Methodical – Work through each scenario with each person systematically, discussing how it works and ask them to demonstrate. Ideally using real work to complete the task.



Inquisitive and Curious

Ask questions as you go, for example:

“Does it always work like that?”

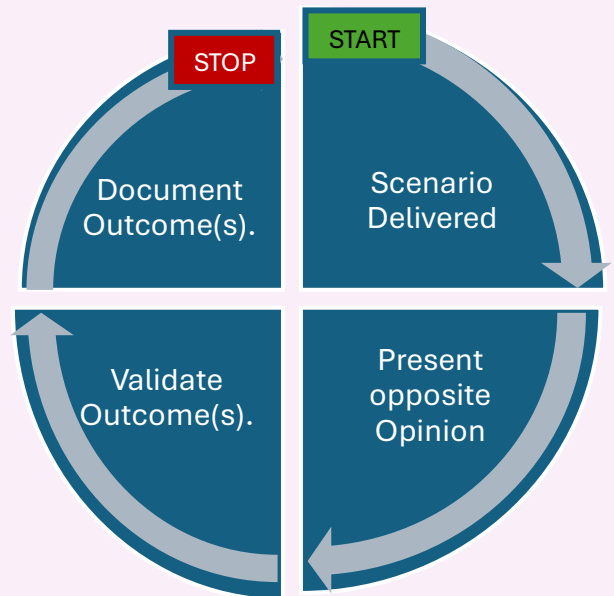
“Do any of our customers need that in a different way?”

“What happens if [insert thing] isn't available/doesn't happen?”

Questioning Techniques. Play Devil's Advocate.

It is important to challenge the information you are presented with. By countering (where appropriate) with the opinions of the opposite side. The aim here, is to uncover additional information that would otherwise remain undisclosed, and therefore undiscovered.

A scenario or workflow is presented in a certain. Ensure that you present alternative elements. Open a discussion to validate and document your outcomes.



Basic Example: Quote Acceptance.

Salesperson: “And then the customer sends through an email with a PO attached.”

You: “What if there isn’t a PO attached?”

Salesperson: “Oh, there’s always a PO attached.”

You: “OK, but imagine there wasn’t, what would you do?”

Outcome: Uncovering what happens in the process if the customer does not send a PO.

Lesson: It’s ok to question if something happens a certain way, you’re trying to understand every scenario as deeply as possible.

REMEMBER: You don’t have to agree with your line of questioning, you are looking to generate ideas/debate to identify issues or additional information.

Self-Assessment Scorecard.

Rate each area of your business on a scale of 1-10. Scale as follows:

1 = totally unclear and un-organised

10 = complete clarity, organised, documented, SLT signed off.

	Business Area/Element	Score Between 1 and 10	Issues to Resolve	Notes
1	Hierarchy and Reporting Lines			
2	Overall Business Structure			Similar to hierarchy but focused on departments
3	Departmental Processes Mapped			Often separate from actual workflows that serve customers.
4	Workflows (Sales, Jobs, Accounting etc.)			
5	Reporting (internal and external).			
6	Internal Communication			Between people and departments
7	External Communication			With customers and suppliers etc – how is this carried out – include it in process maps
8	Data (electronic information on customers, sales, jobs, assets etc.)			
9	Current Software in Use			It's important to know all the software the business uses, including things like excel for certain tasks or processes.
10	Specific Customer Requirements			

11	Specific Supplier Requirements.			
12	Internal Documentation.			The documentation that you use internally between departments if at all.
13	External Documentation.			The documentation that you share with external stakeholders (eg. Job cards, quote, invoices with customers).
14	Compliance and Regulatory Requirements.			Your regulatory requirements, you need to continue to meet these during and following your project, so you need full awareness to ensure ongoing compliance.
15	Accreditations and Readiness for Audit.			
	TOTAL			OUT OF 150

Not all the elements above may be included or relevant to your business so add or remove as you see fit.

Score	Expectation
0-25	Oh dear, looks like you've got some work to do. Pick the easy projects first, building towards more complex ones.
26-75	You've gone some of the way toward achieving business fitness. Concentrate on quick wins and take steps to arrange working on projects that significantly increase your score.
76-125	With this score, I'd say you're ready to undertake any new project you choose. Achieving above 75% might not seem like a lot, but it's better than the majority of businesses. Even some large organisations can't achieve these scores.
126-150	Great, you're more organised and aware of your business's infrastructure than the vast majority of businesses. You're 100% software implementation ready!

Scoring is subjective, and it's worth getting a second opinion. Generally anything below 75 and you should look to improve your areas starting with the most important first, while considering going for low hanging fruit in the first instance.

Ugh, do I have to do all of this now? *:

Nope! Many companies use a new software project or change as an opportunity to review all of the above as they go, and adapt and change as they do.

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Choosing to adjust as you go means remaining extremely agile throughout the project. You have many of the discussions mentioned above during planning and implementation of the actual change.

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In fact, this is how the majority of businesses handle software implementations. At least that's what I've found in the hundreds I've done.

There is nothing wrong with working this way and often it's very motivating to have the project ticking along and waiting for answers, it also provides context for each activity you undertake.

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*Having said all of that, I strongly advise that analysing and understanding your business is something that you should continuously commit to. Then you are always fully aware of how you are operating. Meaning you identify and solve issues as you discover them.

As stated earlier, the business, including the SLT, must approve all findings prior to proceeding with projects. Adjustments may require mini projects, so allow time for these.

You made it to the end, I'm not surprised, what a great document, eh! And let's be honest, it's pretty simple. To understand your business, you just need to talk with the people who know it best: those who work there. Obviously, there is much more to a proper business discovery than I could cover here, but this guide is a good way to start.

I hope you found it helpful.

Also, if you don't think you can do all this stuff on your own, but need to, I can help you through it, here are my details if you would like to get in touch:

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Thanks for reading,

Dan



Ps. You might have noticed the message in the footer. I'm happy for this content to be used by anyone, for any purpose, anytime, so go wild! I'll actually be really pleased if I see it used under someone else's logo or something, after all, there is nothing unique here. I've merely summarised the main things I'd look at, and how I'd start off, if I was carrying out this exercise.