

Technology Meets HR: Selecting and Justifying the Right Solution

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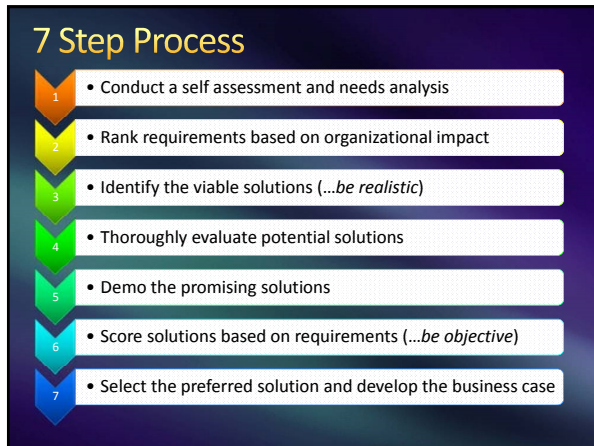
About Sandy Halliwill....

- More years in IT and Business than I'll admit...
- 30+ years in the Oil & Gas industry
- 5+ years with Alaska Native Corporations
- Projects, Management & Consulting
- SAP, ADP, PeopleSoft, Solomon, Costpoint, Taleo, Custom



Technology Meets HR: Selecting and Justifying the Right Solution

Solution	• Clearly define the business problem(s) to be solved and what success will look like
<u>Right</u>	• Resolve the problem(s) – without creating new problems
Justifying	• Evaluate the benefits and cost to implement & maintain (money, time, process change)
Selecting	• Identify the options and select the best fit







#2 Rank Requirements by Importance

- Mandatory "Deal-breaker"
- Critical for current operations
- Required for improvements
- "It would be awesome if..."

#2 Rank Requirements by Value

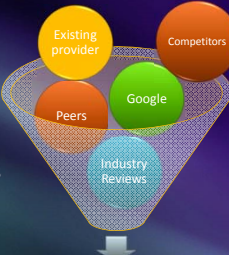
- Cost Improvement**
 - Reduced penalties, internal and external cost (labor, mailing, handling, etc.)
- Additional Revenue**
 - Faster, new market, new product, etc.
- Improved Efficiency**
 - Do more with the same (or less)
- Value is too Hard to Quantify**
 - Rank the importance on an agreed scale (i.e., 1-4)

#2 Rank Requirements

Vet with Executive Sponsor, Steering Committee, Extended Project Team and Stakeholders

#3 Identify Viable Solutions


- Use a variety of research tools
- Don't stick with usual suspects
- Think "outside the box"
- Include a diverse set of candidates



- Evaluations are timely & costly
- Be realistic about viability
- Document basis for selection
- Vet with Sponsor and SC

Narrow the field to 3-5 viable solutions

#4 Evaluate Potential Solutions



- Purchase Price
- Add-ons
- Annual fees
- Consultant Rates

- Customers
- Satisfaction
- Innovation & Improvement

- Service model
- Response times
- User Groups

- Financials
- Geography
- Employees
- Clients

Short-list to 1-2 solutions (3 max)

#4 Evaluate Potential Solutions



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#5 Demo the Promising Solutions

Control the demonstrations

- Don't let it turn into a vapor sales event

Define the test cases and evaluation criteria

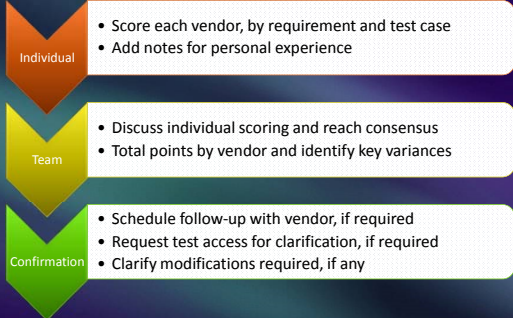
- Based on business need, not the solution
- Tell the vendor before the event and ask they present by case

Allow time for vendors to show added functionality

Schedule demo's to occur consecutively

- All Core Project Team members should participate

#6 Score the Solutions



#6 Score the Solutions



Vet with Executive Sponsor, Steering Committee, Extended Project Team and Stakeholders

#7 Select Solution

Requirements and Scoring

- Consider added functionality but don't overlook defined requirements

Request Pricing

- Base on specific needs, timeline, and modifications
- Request written proposal and meeting to discuss

Reach Core Team Consensus

- Discuss pro's & con's, gut feelings, etc.
- Decide based on *business* needs

#7 Select Solution

Maintain Confidentiality

- Preserve the option to switch to another solution
- Sponsor and Steering Committee may have other factors to consider

Document

- Business decisions can take time
- Document requirements, evaluation criteria, scoring, and justification for recommendation

#7 Develop the Business Case

Executive Summary

Background

- Current situation
- Problem(s) to be solved
- Constraints

Requirements and Evaluation

- Summary of requirements
- Strengths/weaknesses of viable solutions

Benefits, Justification and Return on Investment

- Financial evaluation
- Benefits of preferred solution

#7 Develop the Business Case

- Most companies have a common Business Case format – talk to your Finance Department.
- Calculate the Return on Investment:
 - Current cost
 - Purchase price, modification, and implementation
 - Additional costs – hardware, software, etc.
 - Annual fees and support
 - Business improvements
- Be factual – **there is no magic pill!!**
- There are a ton of samples online – use Google

#7 Present the Business Case



Vet with Extended Project Team and Stakeholders.
Meet with Executive Sponsor and Steering Committee.

Questions