SYSTEMS DISCOVERY PROCESS

Tips to ensure you capture the needs and wants of users when looking for a new systems solution.

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Introduction

When planning for a new technology solution, it is important to gather input from the whole organisation to ensure the system meets the needs of the business. This workbook will guide you through the process of engaging with each department, understanding their requirements, and integrating their feedback into a final system design. Following Project Initiation where the key business reasons for change are identified and key stakeholder support has been obtained to give the 'why' behind change, this stage explains the 'what'. What do you do, what are the key business priorities, risks, costs and opportunities, plus what do you expect to achieve. Only when you have a thorough understanding of this can you investigate the most appropriate solutions for your unique needs.



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Chapter 1: Understanding Departmental Roles and Needs

1.1. Importance of cross-departmental collaboration

Explain why it is essential to involve all departments in the planning process. Discuss the benefits of a well-rounded solution that caters to different departmental needs.

An example of the importance of cross-departmental collaboration can be seen in the case of a large retail company that implemented a business wide IT system without involving all departments. Initially, the system seemed to work well for the IT and Sales departments, streamlining their processes efficiently. However, it soon became apparent that the lack of input from Finance and HR led to significant issues in budget tracking and employee data management. These oversights resulted in costly delays, compliance risks, and a general decline in employee morale. By engaging with all departments from the outset, these issues could have been anticipated and mitigated, ensuring a smoother, more successful system implementation.

1.2. Identifying key departments

List the departments typically involved in IT system planning (e.g., Finance, HR, Marketing, Sales, Operations, IT, Customer Service). Describe the primary functions and responsibilities of each department.





Chapter 2: Gathering Requirements from Each Department

Often a business is in a whole world of pain before they decide to change system for many reasons. To help the justification process, it's a good idea to get each department to document how long it takes to do the tasks they want to change, and how much that's costing the business over the period of a day, week, month or year. If the project is intended to provide new functionality, quantifying the financial benefit of the opportunity adds to the justification and gives a more tangible target to measure the success of the project by.

Finance

Key Needs: Budget management, financial reporting, compliance.
Engagement Strategies: Conduct interviews with finance managers, distribute surveys to gather detailed requirements.
Questions to Ask:
- What financial processes need to be automated?
- What reporting capabilities are essential?
- How should the system handle compliance and regulatory requirements?
- What currently works well in the financial processes?
- What causes friction in the current financial processes?
- What are your top three measures of success for this new solution?

Human Resources (HR)

Key Needs: Employee data management, recruitment, performance tracking.
Engagement Strategies: Hold workshops with HR staff, use focus groups to discuss specific needs.
Questions to Ask:
- What are the key HR processes that need support?
- How should the system manage employee records and data privacy?
- What features are needed for recruitment and onboarding?
- What currently works well in HR processes?
- What causes friction in the current HR processes?
- What are your top three measures of success for this new solution?

Marketing

Key Needs: Campaign management, customer insights, analytics.
Engagement Strategies: Organise brainstorming sessions, use case studies to identify best practices.
Questions to Ask:
- What marketing tools and integrations are required?
- How should the system support campaign tracking and analytics?
- What customer data is essential for marketing efforts?
- What currently works well in Marketing processes?
- What causes friction in the current Marketing processes?
- What are your top three measures of success for this new solution?



Sales

Key Needs: Customer relationship management (CRM), sales tracking, lead management.
Engagement Strategies: Conduct one-on-one interviews with sales representatives, use surveys to gather input.
Questions to Ask:
- What CRM features are critical for sales operations?
- How should the system track sales performance and leads?
- What integrations with other tools are necessary?
- What currently works well in Sales processes?
- What causes friction in the current Sales processes?
- What are your top three measures of success for this new solution?

Operations

Key Needs: Service / product delivery, inventory management, workflow automation.
Engagement Strategies: Conduct focus group discussions with operations staff, use observation techniques to study workflows.
Questions to Ask:
- What processes need improving for better efficiency?
- How should inventory be tracked and managed?
- What workflow automation tools are necessary?
- What currently works well in Operational processes?
- What causes friction in the current Operational processes?
- What are your top three measures of success for this new solution?



IT

Key Needs: System integration, security, scalability.
Engagement Strategies: Hold technical workshops, use detailed questionnaires.
Questions to Ask:
- What are the technical requirements for system integration?
- How should the system ensure data security and compliance?
- What scalability features are needed for future growth?
- What currently works well in IT processes?
- What causes friction in the current IT processes?
- What are your top three measures of success for this new solution?

Customer Service

Key Needs: Customer support, feedback management, warranty management.
Engagement Strategies: Use focus groups with customer service agents, distribute feedback forms.
Questions to Ask:
- What are the key features needed for customer support?
- How should the system handle customer feedback?
- What reporting and analytics are required for customer service?
- What currently works well in Customer Service processes?
- What causes friction in the current Customer Service processes?
- What are your top three measures of success of this new solution?



Chapter 3: Integrating Departmental Feedback

3.1. Analysing and prioritising requirements

Discuss methods for analysing the gathered requirements. Explain how to prioritise requirements based on organisational goals and resource availability. Document cost savings, efficiency gains and opportunities to grow and become more profitable.

3.2. Creating a consolidated requirements document

Describe the process of consolidating departmental feedback into a single document. Provide a template for a requirements document.

3.3. Validating requirements with stakeholders

Explain the importance of validating the requirements with department heads and key stakeholders. Discuss methods for presenting the requirements and gathering final feedback. Make sure that key stakeholders input and buy into the project, starting with their vision for the success of the project and what aspects of the business must be kept and not compromised.





Chapter 4: Communication Strategies

4.1. Establishing clear communication channels

Detail the importance of defining clear communication channels among all stakeholders. Discuss methods for ensuring that communication flows smoothly and effectively throughout the project lifecycle. Consider the use of project management tools, regular meetings, and transparent reporting mechanisms.

4.2. Engaging stakeholders

Elaborate on the ways to engage stakeholders effectively, ensuring their feedback is incorporated and their concerns addressed. Highlight the significance of fostering a collaborative environment where stakeholders feel heard and valued.

4.3. Managing communication challenges

Identify potential communication barriers and propose solutions to overcome them. Discuss strategies for managing conflicts, misunderstandings, and miscommunications. Emphasise the role of active listening, empathy, and clarity in effective communication.

Chapter 5: Risk Management

5.1. Identifying risks

Explain the process of identifying potential risks associated with changing core business systems. Include a discussion on categorising risks into different types, such as financial, operational, technical, and reputational.

5.2. Assessing risk impact and probability

Discuss methods for assessing the impact and probability of identified risks. Introduce tools and techniques such as risk matrices, SWOT analysis, and expert judgment to evaluate risks thoroughly.

5.3. Mitigation strategies

Provide strategies for mitigating risks, including preventive measures and contingency plans. Discuss the importance of being proactive in risk management and maintaining flexibility to adapt to unforeseen circumstances.

5.4. Monitoring and reviewing risks

Describe the ongoing process of monitoring and reviewing risks throughout the project lifecycle. Emphasise the role of regular risk assessments, audits, and updates to keep the risk management plan relevant and effective.



Conclusion

Changing business systems is never an easy decision to make. It consumes time, resource and money and can go wrong, but if you follow this process, or one similar, you should have a robust requirements document to give to potential suppliers against which you can score them on a level basis.





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