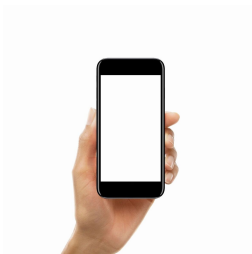




Are you new to Project Management?

Key concepts in this blog are Launching and Planning your project. Aligning leadership on the scope of your project and getting a deep understanding of business requirements are critical for a Bold Transformation. Learn more about these process steps in the **PM Essentials** section of my website.



Talk to Me!

I'm glad to discuss your transformation effort! Reply to this email to schedule a free 1 hour consultation.

BOLD Transformation

The following best practices for defining a bold transformation will

position you for success in your change journey.

Recently, I wrote a *Global Payroll Transformation Case Study* and my last blog focused on some of the implementation best practices that I realized during that project. I think many people believe that transformation is naturally **BOLD** but more often, transformation ends up being **BIG** rather than **BOLD**. Defining specific strategic goals, incorporating “big thinking” in solution recommendations, and striving to deliver value quickly are all ways to make your transformation **BOLD**.

Set Specific Bold Strategic Goals

When an organization asks for support in a transformation program, I use a standard approach to guide senior leaders in the definition of BOLD goals and objectives. This requires asking questions:

- * What do you think the specific goals of this transformation should be?
- * How do these goals support the organization’s strategy?
- * What would a successful implementation look like and feel like?
- * What BOLD steps do you think are necessary to achieve this transformation?

The biggest challenge in interviews with senior leaders is getting responses that will guide the transformation in a specific direction without limiting ‘big thinking’ in the solution. Sometimes a leader’s goals are described in such vague terms that they give little direction at all, almost nothing is outside the initiative’s scope. While other leaders are specific in “how” they want you to solve a problem but provide little clarity on the strategic goal or “why” the transformation effort is important. Both of these responses drive a transformation to be **BIGGER** rather than **BOLDER**.

Here’s a good example of a senior leader’s specific goal: This Payroll transformation needs to reduce the risk of the company being unable to process payroll in any specific country due to the loss of staff or systems. We need to pay all employees in a timely and accurate way, especially our customer facing personnel which drive the company’s revenue stream. Success would be having reliable, sustainable payroll resources and systems available for every country. One bold step would be creating redundancy into our payroll environment.

Although this strategic goal is specific, it leaves the solution open for the team to define and doesn’t limit their ability to recommend multiple alternatives.

Evaluate Bold Solutions

Based on clear strategic goals, the team can be brought together to define

potential solutions. At this point in the process you are striving for “big thinking” by experts and team members that understand the current environment. Again, we need to ask questions:

- * What BOLD steps do you think are necessary to achieve this transformation?
- * What solutions should we consider? What would the successful implementation of each of those solutions look like and feel like?
- * What challenges within the current organizational environment will need to be overcome?
- * What attributes of the current environment support or enable this transformation?

In our specific example, this group of leaders and team members would be in the best position to identify different solutions for creating reliable, sustainable payroll resources and systems for every country and potentially drive more redundancy. They have the best knowledge for how processes and systems work and they recognize challenges such as language barriers and differences in local legal requirements. External expertise is helpful to expand the team’s knowledge of solutions available and encourage “big thinking”.

Usually, there are multiple solutions available to solve a problem. Some may be extensive, providing higher value but also requiring more time, risk and cost. Others may be very targeted, addressing part of the issue well but perhaps not addressing everything. Resist the temptation to recommend solutions beyond what is required to achieve the strategic goal. A transformation solution doesn’t need to be **BIG** to be **BOLD**. Several small, yet bold, changes may be the best solution to pursue.

Define a Bold Solution Roadmap

Once the organization has decided on a transformation solution, the implementation team should define the best approach to design, develop and implement it. I encourage people to “think like a customer”. Some questions that are helpful to consider:

- * What parts of the solution add the greatest value or achieve most of the strategic goal?
- * What part of the solution do people need first? What has the highest support?
- * What part of the solution is the fastest and easiest to implement to realize value?

Resist the temptation to expand the solution design beyond what is needed. I’ve seen transformation projects that become more about achieving someone’s **BIG** agenda rather than solving a **BOLD** strategic goal. Consider the 80/20 rule when building a roadmap. Drive several short, high value projects to stay

focused on **BOLD** and deliver concrete value quickly.

Remember the old saying “strike while the iron is hot”. Organizational goals can change and retaining resources may become difficult. The faster you deliver value, the more likely your transformation effort will achieve the strategic goal and be perceived as a success.

So, how have you made your transformation **BOLD**? Reply to this email with your comments.



Additional Resources

Understanding what users really need is important to define and design a bold transformation. A good read is “**How Design Makes the World**” by Scott Berkun. This book teaches everyone what good design is and why it’s so important. How to ask better questions and how to make organizations more design mature.

Learn more about how to capture business requirements with this Perforce blog: **Managing Requirements: Tips, Tactics, & Tools**. I’m not endorsing the company but I like the definitions, important steps and best practices shared in this blog.

Check out my previous blog on how to **Translate Strategy Into Action** with additional insight on goal clarity, understanding business requirements and leveraging team wisdom.

Please share this newsletter with your colleagues!

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About Annette

Annette is a business transformation coach working with executives to create more effective operations and greater business value. Both vision and execution are key to motivate people to transform work. She guides leaders to develop transformation vision and strategy, structure implementation projects and roadmaps, and she mentors project teams to be successful. She also shares tips, resources and leading practices as a PM mentor and through her

Transformation Tips blog.



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