



Singularity Consulting

Intelligent Relationship Management

Intelligent Relationship Management Solutions

IRM Strategy

 **Program Portfolio Management**

Business Intelligence Strategy

Business Intelligence Implementation

Program Portfolio Management

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Program Portfolio Management

The most frequently cited reasons for failure in implementation of CRM or BI initiatives is the lack of cohesive management strategy, and the lack of comprehensive, focused management execution. Under competitive pressure from all fronts, organizations find it difficult to multi-task the resources tapped to carry out these critical initiatives. Without adequate planning and communication, most organizations have found their expectations missed, and the promise of these technologies to be elusive. At the end of the day, projects are late and over budget, sometimes never completing at all. At Singularity Consulting, we know the block and tackle necessary to fulfill your Intelligent Relationship Management vision. Our experience lies in crafting complete, realistic projections of the time and resources required to successfully implement the broad change that CRM and BI programs entail. Singularity can better prepare your company for the multi-discipline change that Intelligent Relationship Management requires. We keep your organization focused on results, informed of progress, and ready for the change inherent to realization of the intelligent, customer-centric enterprise.

Primary Features

Intelligent Relationship Management is a business imperative, not a technology initiative. Success in IRM, CRM or BI requires the organization approach the objective with systemic focus and discipline. As such, IRM programs are long-term initiatives, with many dimensions of change, and are best undertaken in phased, measured implementations.

The purpose of IRM Program Management is to establish and conduct the tactical operations necessary to achieve and sustain strategic IRM objectives. Elements critical to the success of an IRM Program include committed staff, proper planning, budgetary control, communication management, risk management, change management, implementation methodology, and performance metrics.

Primary Benefits

Clients benefit, in terms of speed and reduced risk, from Singularity's experience in establishing properly scoped and organized portfolios and program management offices. Singularity consultants work side-by-side with your managers to define the PMO, and if desired, Singularity consultants can fill key roles on the PM team. The key to successful program execution is focus and attention; dedicated and trained program and project managers are a necessity. Singularity consultants can conduct projects or entire programs, acting as key resources to your staffing needs. Clients engage Singularity project managers as a means of providing on-the-job training in our Implementation Methodology to your employees.

Singularity's proven approach to Intelligent Relationship Management implementation and management can guide your organization's development into a customer centric enterprise. Because we have been through many implementations, we can anticipate the issues that will arise and avoid the pitfalls that trouble many companies' initiatives. For instance, many organizations fail to realize that it is just as important to methodically retire obsolete systems and processes as it is to prepare your employees for new operations.

Program Management Office (PMO) Organization

Features

- The **PMO Charter** captures the call to action defined by the company's IRM strategy. It communicates the case for change, the program mission and approach, and the measures of success. The charter must be inclusive and validated by all parts of the business, and should be published to all employees.

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- The **PMO Structure** defines the role, responsibilities, reporting structure, and resources necessary to carry out the IRM program. In addition to providing leadership and sustained focus throughout the phases of implementation, the PMO provides visibility to the IRM program throughout the organization. It needs autonomy to operate, yet must have close ties to and buy-in from all functions in the organization.
- The **PMO Budget** forecasts the financial investment necessary to carry out the charter. This budget includes expenses direct to the PMO, and indirect for the business functions matrixed to the program.
- **Staff Requirements and Skills**, both dedicated and adjunct, are defined and candidate sources are identified.
- Progress **Tracking and Management** systems and tools are specified, evaluated, procured and installed. Training on the systems, as necessary, is conducted.

Benefits

- Clear project expectations.
- Objective status reports.
- Accountability for results.

Activities

- Background review and management interviews.
- Facilitate crafting of and consensus to the PMO Charter.
- Develop PMO organization directory.
- Develop and gain approval of PMO budget
- Develop skills matrix and staffing plan.
- Define progress tracking processes and systems.



Program Portfolio Planning

Features

- The **Program Portfolio Plan** describes the overarching program of phases, projects and milestones that must be conducted to achieve the Program goals. It documents key objectives assumptions, success criteria, and risks the program faces.
- One or more **Project Plans** describes the objective, approach and key assumptions for the dependent project or phase, as well as its interdependencies with other projects. Each project will include a **Change Plan**, mapping out the steps that must be taken to prepare impacted organizations for change, to support them through the change, and to gather and disseminate organizational learning from each phase.
- The **Project Schedule** is a comprehensive work breakdown structure, critical path and timeline. As part of detailed planning, the schedule is decomposed into activities and tasks, with assigned and allocated resources explicitly identified.
- The **Portfolio of Business Cases** details the financial resources necessary to conduct the program and project, and projects the financial benefits expected to accrue from the program. This typically includes a discounted cash flow or NPV analysis, as well as Return on Investment computations.
- A **Communications Plan** sets forth the types of communications necessary for each stakeholder audience, and the frequency and methods for each communication. Communication channels are established, including multiple means to receive and respond to feedback. An important aspect of communications planning is strategically-timed introduction of the improved company to its customers for the greatest positive impact.
- A **Risk Assessment** is performed upon completion of a plan, with the final step to the planning phase being a **Risk Mitigation Plan** that identifies actions to be taken to reduce the severity and probability of the identified risk aspects.

Benefits

- Detailed, realistic plans.
- Coordinated, manageable efforts between and across projects.
- Objective cost-benefit study.

Activities

- Write and review program and project plans.
- Develop work breakdown structures.
- Define task dependencies and critical path.
- Resource project schedules.
- Derive project milestone target dates.
- Develop cash flow analysis of project investment and projected benefits.
- Define and establish communication channels.
- Assess risk factors and baseline risk.



Program Management

Features

- **Active Performance Tracking and Reporting.** With a project manager dedicated to timely execution of the plan, and quality of each work product, the probability of success is strong. Performance against projected timeline and budget are key metrics. Also key to success is a project manager whose experience and expertise are recognized by the team, enabling him/her to be a trusted advisor for issue resolution, or escalation when necessary.
- **Rational Risk Management.** Risk is a fact of business life; it cannot be avoided, but should be systematically assessed and mitigated. The management of risk involves identification of discrete risk factors and potential outcomes, quantification of the firm's exposure, and formulation of mitigating actions. These actions should be prioritized and performed based on their cost relative to the risk exposure. The **Risk Plan** must be periodically reassessed and revised during the life-cycle of the program.
- **Consistent Communications Management.** Tailored to the needs of the audience, regular communication will keep your management team apprised of critical status and risks, and sustain your organization's interest and enthusiasm in the final outcome high.
- **Coordinated Change Management.** The very nature of an IRM program is to effect broad-based change in an organization. Sometimes this reaches as deep as impacting elements of the culture of an organization. Changes to business processes, employee skills, and reward systems are examples of changes that must be completed in concert with the technology aspects of the program. Just as important as the introduction of new systems, attention must be given to orderly retirement of obsolete systems and operations. In fact, high-impact organization change should be managed as focused projects within the overall program.

Benefits

- Disciplined project management
- Sustained momentum.
- Improved communication.
- Organization is aligned with change.

Activities

- Conduct regular progress meetings.
- Issue periodic and event-based communications.
- Facilitate change plan workshop.
- Prepare impacted organizations for change through training, repurposing, etc.
- Adjust plans to mitigate risk.



Implementation Strategy

Features

- **On the job training and knowledge transfer** in use of our entire Phased IRM Methodology. This includes development of financial and marketing metrics, business case analysis, as well as use of best practices in software architecture.
- Customization of our methodology, including **documentation and templates** for your enterprise and industry, and guidance in completion of a case. Our methodology is a comprehensive process that defines the deliverables and outcomes of the process, the road map of activities to accomplish objectives, and the roles and responsibilities of everyone involved in the process.
- **Troubleshooting and support** during your team's IRM learning stages.

Benefits

- Proven approach.
- Tools and templates.
- Support when needed.

Activities

- Needs assessment.
- Customization of training, tools and templates.
- Conduct training workshop.
- Set up support channels.

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Engagement Process

Program Portfolio Management Engagement Process

