Stories   I.

"Yes, we have a big problem but no-one has made any mistakes ..."

The board of directors of this Fortune-500 company was upset about their consolidated monthly profit and loss statements; they where inaccurate, incomplete and above all, eight days late. Finance claimed they were collecting all data on time and submitting their data-sets for processing at the computer center well before the deadlines. Information technology on the other side, had logbooks proving that all programs ran on-schedule, without any delay or complications.

In a last-ditch effort to please the board of directors, finance started anticipating upcoming challenges and adjusted data-sets prior to sending them off for data-processing by the IT-department. The result was a catch-22 situation; successful when the system failed and flawed when the system worked correctly.

When I accepted this assignment, finance and information technology had been seriously at odds with each other for nearly three years. I interviewed everyone involved in producing the monthly profit and loss statements; covering no less than twelve departments. When I brought them together, they soon found common ground on the map I had made of all their work processes from beginning-to-end. Seeing the bigger picture ignited their curiosity and determination for solving this tenacious problem once and for all.

We found the root cause of their challenge in less than sixty minutes; it was a design flaw in a piece of software for a new application. Together we designed a scenario guaranteeing a smooth and uneventful year-end transition that was upon us. When I walked into the Finance Director's office on January second, I found him beaming from behind a clean desk. He had spent his first Christmas and New-Year at home again instead of at the office as was his routine of the past three years.

Stories   II.

Becoming a forerunner in your industry ...

A new and energetic CEO of a commercial company decided to use Information Technology as a Competitive Advantage. Right away he assigned an intern to conduct a Request for Proposal (RFP) replacing a set of obsolete databases with some serious legacy issues that he inherited from his predecessor.

On my second day on the job I found out that what he had signed for was actually a suite of programs or a specialized Enterprise Resource Planning (ERP) system. The supplier promised to scrub the old data for errors and duplicate entries, migrating the data-set from the old system to the new one and training the research department's five employees.

This contract was not intended to achieve any competitive advantage, as it was severely under-utilizing the system's capabilities and sure to show a low Return-on-Investment. Therefore, I initiated writing a strategic plan, laying out my multi-year vision for an integrated data-base, data-sharing, communication and transaction system, serving a rapidly growing number of offices and independent contractors. The plan was accepted and I coached the executive management team on implementing this strategic project, teaching them formal change management techniques, and conducting some urgently needed business process re-engineering.

Based on that strategic plan I was invitation to speak at a national conference that same year. The CEO went on to win awards for his service and he show-cased the system at the national conference on several occasions, using the very same models that I used for him and his board in accepting my vision for his company. This firm is now one of the fastest growing businesses in the area.