ERNI experience reports on management, processes and technology

Experience

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STRATEGIC PARTNERSHIPS
Powerful in tandem

SCRUMBUTS
Scrum without the ifs and buts

STRATEGY FACILITATION
Viable strategy through facilitation

TENDERS
The methods for the right solution provider

THE POWER OF COLLABORATION

ERNI
enables & delivers

The half-life of products, the recovery and consolidation periods, the innovation cycles; in all sectors of the economy, these phases continue to become ever shorter. Accompanying this acceleration is a growing need for stable, strategic partnerships: Providers that you can rely on. Consultants with precise knowledge of the specific circumstances in companies and their environment and who can provide a corresponding valuable contribution towards mutual success.

In a long-term partnership, it is beneficial for your partner to invest in common objectives for example. The first article in this issue of Experience demonstrates how strategic partnerships can almost double the effectiveness of cooperation.

Our second article illustrates the advantages a close partnership in software development can bring to all parties. Through intensive collaboration, an external specialist can provide effective support in necessary improvements, for example, in process adaptation and in clarifying roles.

The third article discusses the significance of specific domain expertise, both in decision-making and strategy workshops. Having a deep insight into into the sector, helps the moderator significantly improve results.

In addition to high methodological competence, efficient support for tendering processes requires a deep understanding of the customer and their environment. As the final article demonstrates, this is acutely evident in the public sector, where depending on order volume, there are mandatory rules which must be adhered to.

I wish you all productive partnerships and hope you enjoy reading this issue.

Best regards,
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POWERFUL IN TANDEM

When providers and customers become strategic partners it can create long-term added value for both sides.

Through closer integration, both sides of a strategic partnership benefit from higher predictability. By developing together in this way, they become true sparring partners.

BY DAVID ZILTENER AND PETER ZUBER

Innovation, time and cost pressures, increasingly rapid technological advances, as well as the prevailing shortage of skills, all lead to profound upheavals in product development processes: Increasingly companies concentrate on their differentiating core competencies, and are sourcing additional or specialised engineering services, as well as other services, from external suppliers.

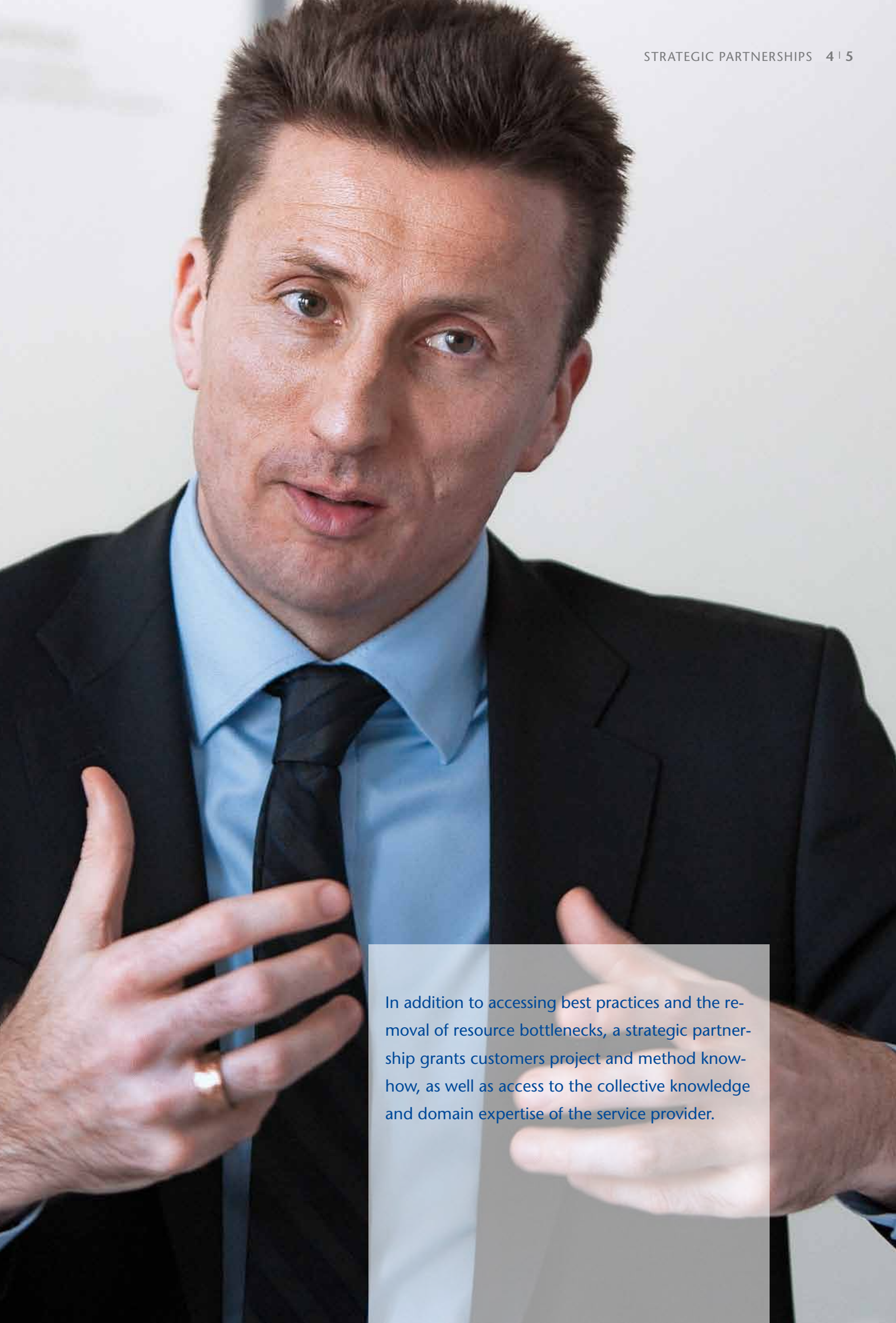
In practice, different forms of cooperation have evolved from this concept. These range from bringing in external resources for the short-term replenishment of the in-house team or as an extension of the workbench through coaching and consulting, or alternatively outsourcing entire projects in the work contract. Strategic partnerships go one step further: In the form of trustworthy and binding collaborations, they create a mutually beneficial and long-term business relationship with corresponding added value.

One major advantage is greater planning security, from which both partners can benefit equally; For example, the service provider can train its employees in coordination with the needs and specific market requirements of the customer and in this way can timely provide the skills that will be required in the medium and long term.

In addition to accessing best practices and the removal of resource bottlenecks, a strategic partnership grants customers project and method know-how, as well as access to the collective knowledge and domain expertise of the service provider. In turn, the intensive cooperation enables the provider to continuously build on its competencies in the specific segment. This creates continuous and effective teamwork, enabling customers and providers to become true sparring partners.

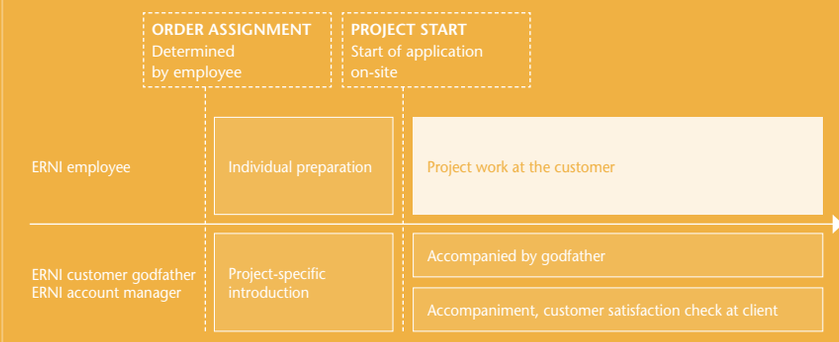
However, a strategic partnership requires more transparency and a higher exchange of information than a traditional customer-provider relationship. Therefore, in conjunction with a joint commitment at the management level, a mutual sense of trust is essential. Moreover, cooperations at this strategic level must be well coordinated and maintained. On the other hand, it is precisely this closeness that brings a number of significant advantages; For example, any process issues become quickly apparent. The service provider can identify priorities and needs at an early stage, uncover weaknesses and potential for optimisation and above all make a proactive contribution. Under certain circumstances, a closer integration means that strategic partners can also entirely assume a component of the value chain. This significantly reduces the number of providers and thus also the complexity.

Without question, the most important success factor for a strategic alliance is



In addition to accessing best practices and the removal of resource bottlenecks, a strategic partnership grants customers project and method know-how, as well as access to the collective knowledge and domain expertise of the service provider.

Fig. 1: The ERNI introduction programme: efficient project start thanks to advance input



This intensive introduction programme, which is carried out by the service provider with no associated costs for their partner, ensures that every external employee is utilised productively with immediate effect and requires no further training by the company.

the choice of the right partner. It is therefore recommended to compile a list of criteria before a decision is made. Indeed, the most obvious partners are not necessarily the best. This catalogue should also include questions such as the following: Does the service provider actually command the necessary domain expertise and does he focus specifically on the core industries? Does he command not only methodological know-how, can he also cover the full spectrum all the way up to implementation?

Of key importance is also the «cultural fit» of the two partners, i.e. the partners should meet at eye level and the service provider should be able to offer a high degree of customer focus. If this is the case, the result can be a long-term win-win constellation.

Example 1:

STRATEGIC PARTNER BECOMES DEVELOPMENT DEPARTMENT

The software development at a renowned manufacturer of measurement systems is no longer able to keep up with developments in hardware. The main causes for this are a lack of human resources and deficits in the architecture. The consequences are farreaching; the time-to-market continues to grow and the company risks losing its competitive edge. Owing to the complexity of the projects, the involvement of external human resources is not able to solve the issue effectively. The company ultimately decides to enter a strategic alliance with a competent partner with whom they have had a good working relationship for some time, and to transfer overall responsibility for software development.

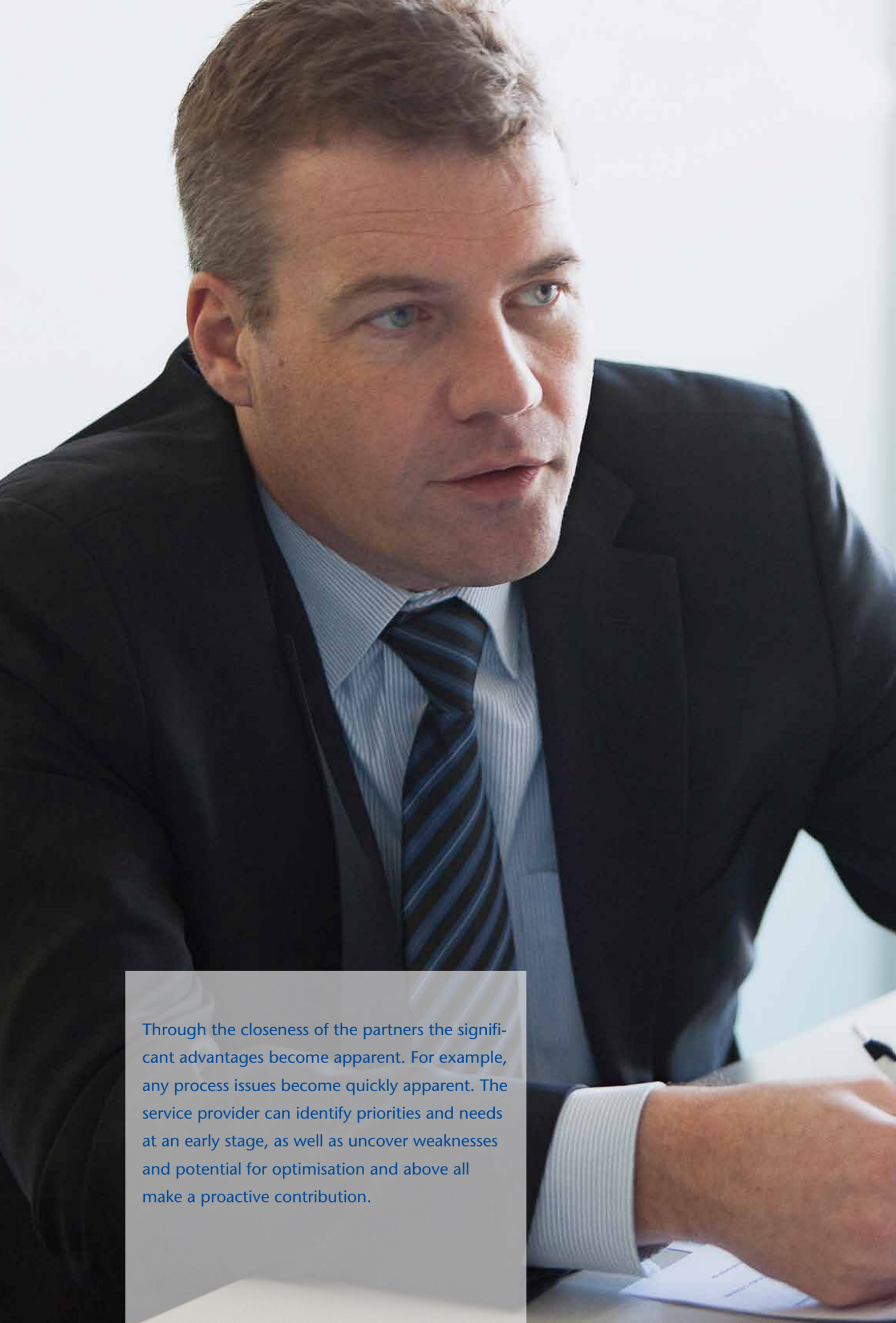
After a thorough analysis of all requirements, the strategic partner has established a 16-person core team at its site within just three months. Henceforth, this team works exclusively for the high-tech company, functioning in essence as its own software development department and working closely with the hardware specialists and the specialist departments. If there is a requirement for specific additional tasks, for example that lie outside of daily business – qualification tests, for example – then an expanded core team that is also very familiar with the customer's requirements can step in immediately.

As a result of the strategic partnership, the measurement system manufacturer is once again able to conduct software development in tandem with hardware development. Simultaneously, because all the processes and steps are carefully and consistently documented by «its» IT department at the strategic partner, the manufacturer also benefits from a long-term conservation of know-how.

Example 2:

HIGH PRODUCTIVITY THANKS TO INTENSIVE INDUCTION PROGRAMME

A company operating in the public sector requires external human resources for a complex, long-term project in the area of business analysis. In this case it is able to fall back on a pool of well-trained specialists on the side of their strategic partner. As an investment in the long-term partnership, the company launches a dedicated introduction programme in which all employees assigned to the



Through the closeness of the partners the significant advantages become apparent. For example, any process issues become quickly apparent. The service provider can identify priorities and needs at an early stage, as well as uncover weaknesses and potential for optimisation and above all make a proactive contribution.

customer must participate prior to project start. Among other aspects, the detailed programme encompasses the core processes, the business divisions, the key stakeholders and contacts, as well as the methodological approach of the company for which they will be working in the future. Furthermore, every specialist is given a personal introduction by the account manager. If new employees join the team during the project, they are appointed a colleague who has been on board for a longer period – a so-called «godfather». This person serves as a trusted partner and supports the introduction.

This intensive introduction programme, which is carried out by the service provider with no cost implications for its partner, ensures that every external employee is utilised productively with immediate effect and requires no further training by the company. Through the close collaboration, the service provider has precise knowledge of the specific culture of the individual teams on the side of the customer and can thus select employees for an optimal fit to the existing team. The public company thus benefits from significantly fewer changes in personnel.

Example 3:

STRATEGIC PARTNER ASSUMES PROVIDER MANAGEMENT

At a globally active medical technology company with centrally organised research and development, the number of providers in the area of engineering and services has grown to more than 50 over the years. To reduce this complexity in the future, the company plans to work directly with fewer external service providers and, to this end, to establish a so-called preferred provider model. It therefore decides on a strategic partnership with one of its long-standing suppliers, who not only has deep technical and methodological know-how, but also comprehensive domain expertise.

Henceforth, the strategic partner assumes the administration of a majority of existing mandates, as well as the handling and delivery of engineering and other services. As a result of the long-standing cooperation, the partner has precise knowledge of the needs and requirements of the medical technology company and is thus able to deliver targeted and accurate results. Moreover, the customer will also benefit in future, from straightforward access to all shoring sites, ramp-up programmes for juniors, dedicated introduction programmes and from the collective knowledge and services of its new strategic partner.

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SCRUM WITHOUT THE IFS AND BUTS

Scrum can significantly increase the efficiency of development, whereby the success factors lie both within and outside of the team.

Although Scrum is very simple in theory, its successful implementation does represent a challenge. Nevertheless, it is possible to objectively measure the degree of maturity, including through the use of so-called ScrumButs. The necessary improvements usually comprise both process adaptation and the understanding of roles within and outside of the team.

BY ANDRÉ HORISBERGER
AND BRUNO HEUFELDER

Regardless of the size of the organisation, Scrum is now used successfully in virtually all business sectors. The advantages offered by agile software development are numerous in comparison with conventional phase-based models: Markedly improved product quality, a much shorter time-to-market, considerably higher transparency and greater customer proximity through the increased involvement of the customer, all address central challenges in any company that wants to, and must prevail at a national and global level.

In combination with the success of agile software development, reports of failure have been increasing for some time; For example, the introduction of Scrum does indeed help to achieve much greater transparency in projects, but there is nevertheless a parallel rise in costs. The term ScrumButs has become generally accepted in this context. This refers to clearly identifiable shortcomings in the practical implementation of Scrum, which inhibit Scrum from achieving its full potential. As a rule, these arise when individual aspects that have been defined in the method, are changed or omitted entirely.

In principle it is possible to distinguish between two different causes of ScrumButs. On the one hand are adaptations that are made in order to optimise Scrum in the framework of the established continuous improvement process. On the other hand are adaptations that, without any intention of improvement, become established in the everyday practice of the project or company. Above all, in the latter case, the improvements in performance and quality expected through the use of agile methods, are often not achieved.

Furthermore, in larger projects the need often arises for additional roles and artefacts, as well as a framework that enables a better integration into the organisation. In such cases, the term ScrumButs should not be used. Extensions for Scrum do exist for large organisations.

Typical examples of ScrumButs are:

- Rather than handing over the responsibility, the product manager project manager, line manager or Scrum master set the specifications for the development team with regard to workload estimates, work allocation or decisions on the technical implementation, or they change the priorities during the sprint.
- The development of additional features takes precedence over the quality assurance of the outstanding features *(the so-called Definition of Done is not observed)*.
- The development team does not assume responsibility for the implementation and quality of the delivery itself, but instead expects coordination from the product owner, Scrum master or project leader.

Such ScrumButs usually result in poor quality software, low performance on the side of the development team and delays to deliveries. In fact, many setbacks in the course of a Scrum introduction can be

Relative to traditional project organisation, Scrum brings about a decisive shift in competences and responsibilities. In particular, a great deal more personal responsibility is demanded of the developers, and the supervisors must find a leadership style in which motivation and skills take centre stage, as opposed to control.

attributed to such typical deficiencies in the implementation of methods. If, for example, the quality has been compromised because new features are classified as more urgent, there is a subsequent and almost automatic growth of technical debt, which sooner or later will have to be repaid with interest.

A failing ScrumBut often results from the participants lacking a clear understanding of their roles, which ultimately does not lend itself to the adoption of the outlined agile methods. Relative to traditional project organisation, Scrum brings about a decisive shift in competences and responsibilities. In particular, a great deal more personal responsibility is demanded of the developers, and the supervisors must find a leadership style in which motivation and skills take centre stage, as opposed to control.

This fundamental change within the mindset of the participants can be observed throughout the continuous process of improvement laid out by Scrum. Experience shows that this is best achieved when external experts assist an organisation on this path. Such experts are independent of the company's internal politics and can fall back on broad experience from many similar configurations. This enables them to ensure that all methodological deficiencies within the Scrum process are identified and eliminated, and that a problematic understanding of roles among individual participants is jointly identified and corrected; For example, through step by step in coordination with the development team, an external coach or Scrum master can develop specific definitions of Scrum duties and responsibilities in relation to the daily work. As a rule, the beginning of the improvement process is marked by an analysis of the current situation, which can be used to identify deficiencies. Together with all participants, the necessary measures can then be determined in a roadmap by means of a cost-benefit prioritisation.

In the Scrum environment, particular attention is given to quality. In order to optimally ensure this quality, structures must be created to ensure that the tests do not thwart the fast development cycles that feature in Scrum. This includes the highest possible level of automation and clearly structured, standardised test management.

Example 1:

CONTINUOUS IMPROVEMENTS TO QUALITY AND DELIVERABILITY

A few months after the introduction of Scrum, a medical technology company notes that improvements in the quality of software components and in the deliverability of the development team, have not materialised to the anticipated extent. Rather, a range of problems have accumulated over time, among other things because quality was neglected due to pressure for the rapid completion of features. This negative development is reinforced by the behaviour of individual participants, which is influenced by the phase-oriented development that was formerly practised in the company. This results in misunderstandings about the competences and responsibilities of the project manager, product owner, developer and Scrum master.

To get a better grip on the processes, an external specialist is consulted as a Scrum

master. In addition to a review of the individual approaches, his role is above all to improve the communication between the parties and to support change management in the understanding of roles on the side of the participants. To this end, there is clarification of the interfaces between the participants and their competences and duties, among other measures. In order to drive forward and anchor the improvements in the long term, he also ensures that the continuous improvement process of Scrum is well applied in every development cycle.

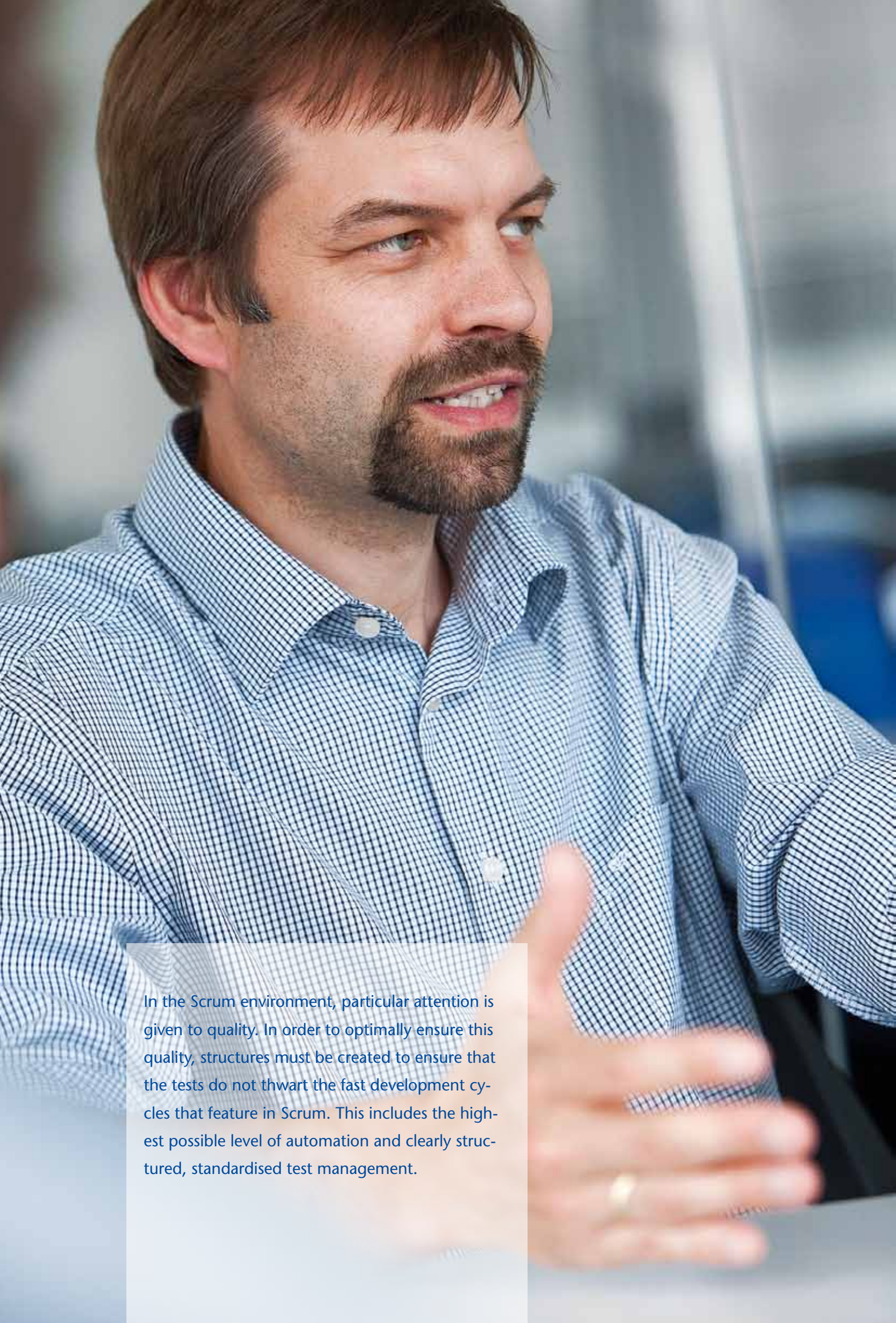
Significant progress can be seen after just a few months. The delivery assurances made by the developers are being met to an ever-growing extent, and the quality of the finished components is increasing measurably.

Example 2:

USE OF A TOOL REVEALS ORGANISATIONAL DEFICIENCIES

Following the introduction of Scrum in a product-specific software development department of a technology company, a number of obstacles arise that interfere with the processes and thus prevent the agile development from fully demonstrating its potential for improvement. Instead of the previously used Excel monitoring, the company decides to introduce a specialised tracking tool. This is intended to assist further in clearly structuring the processes and responsibilities, and in unifying and improving the communication between the participants.

External Scrum specialists are consulted for the evaluation and implementation. Over the course of the project, these specialists not only successfully introduce the software tools, but also through their past experience were able to identify various organisational deficits. In particular, these include misunderstandings in the responsibilities and duties of the individual Scrum roles. The defects identified by the external experts in the con-



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text of the software implementation, show the technology group where there is a specific need for action. The company can now specifically address these areas.

Example 3:
SUSTAINABLE IMPROVEMENT OF SCRUM TESTING

A manufacturer of standard software recognises improvement potential in their test management more than one year after the development teams begin working with Scrum. There is a lack of clarity between the participants with respect to test strategies, processes and approaches. The responsible management recognises that in the medium and long term, this state of affairs poses a serious risk for the quality of the products.

External experts are therefore consulted to ensure an unbiased and thorough analysis of the entire testing organisation. These experts are characterised not only by very broad experience in the successful development of test management in the Scrum environment, but as external consultants, they are also free to openly identify deficits.

For the ascertainment of the current state of affairs, structured interviews are carried out with representatives from all stakeholder groups. These bring to light a number of weaknesses in the organisation. Among other issues, there is a lack of comprehensive test management that is applied consistently throughout all development teams. Additionally the test database is not centrally maintained and the error message reports are not processed uniformly. On top of this, a relatively large part of the testing is still being conducted manually, whereby the testing has trouble in keeping pace with the fast Scrum cycles. One objective of the improvements should therefore be an extensive automation of testing.

From this analysis, the Scrum specialists can derive a number of measures in the areas of test management, processes, test data, time management and employee skills. This includes, above all, an evaluation of every individual measure with respect to complexity and benefit.

The results of the analysis and the subsequently derived, suggested improvements are discussed and jointly prioritised with all stakeholders in a workshop. This ensures that the agreed improvements are implemented in the organisation on a sustainable basis.

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VIABLE STRATEGY THROUGH FACILITATION

Facilitated strategy workshops are an extremely efficient means of initiating change processes.

In order for the strategy workshops to achieve their objectives, the facilitator must not only be a master of his specialised methods but must also have knowledge of the industry and domain-specific challenges faced by the discussion participants. Only then is he able to direct the attention of the group towards the right subjects.

BY PETER ZUBER, RETO LÜTOLF AND DANIELA MOSER

Dynamic change processes are a part of everyday business today. An effective means of efficiently initiating these processes are strategy workshops at management level. Taking place away from hectic everyday business, they offer an ideal opportunity to generate new approaches, to rethink alignments and orientations, to overcome conflicts or to set commitments for important objectives and processes.

In many cases, the participants in such workshops consist of a heterogeneous group with differing perspectives on the specific question or problem. It is therefore advisable to bring an external and neutral strategy facilitator on board who can select the appropriate working methods and tools, in order to effectively assist and support the group in finding ideas and solutions.

An accomplished facilitator directs the events of the group so that each participant is taken seriously, and feels an equal part of proceedings and encouraged to make an active contribution. His neutrality helps him to collect the different viewpoints in an unbiased manner, to make connections and, if required, to function as a mediator between the discussion participants.

The facilitator summarises the interim results and ideas and presents them in a manner that is tailored to the target groups. So-called «visual facilitation» has proven to be particularly useful in this context. This refers to a visualisation of results using simple images, symbols and metaphors, which are created by hand on flip charts or posters. This enables the straightforward illustration of complex relationships and moreover, the figurative representation helps to ensure that nobody loses sight of the bigger picture. The flip charts can simply be photographed after the workshop for the discussion protocol.

In addition to the appropriate tools and methods, the strategy facilitator requires two critical assets at his disposal: customer insight and domain expertise. Only when he has sufficient knowledge of the company or subject-specific challenges, visions and the industry sector the market trends and competitors, is he able to optimally coordinate the processes within the workshop. This provides him with the platform to correctly assign priorities in the creation of critical content.

Furthermore, strategy workshops generally take place under a certain amount of time pressure and often comprise a wide range of controversial issues. Only an experienced facilitator with corresponding domain expertise is able to steer the focus towards the right issues, to ask pertinent questions and to emphasise the content. In doing this, he can ensure that the discussion stays on track. This is of crucial importance if the goals of the workshop are to be achieved, namely establishing a solid

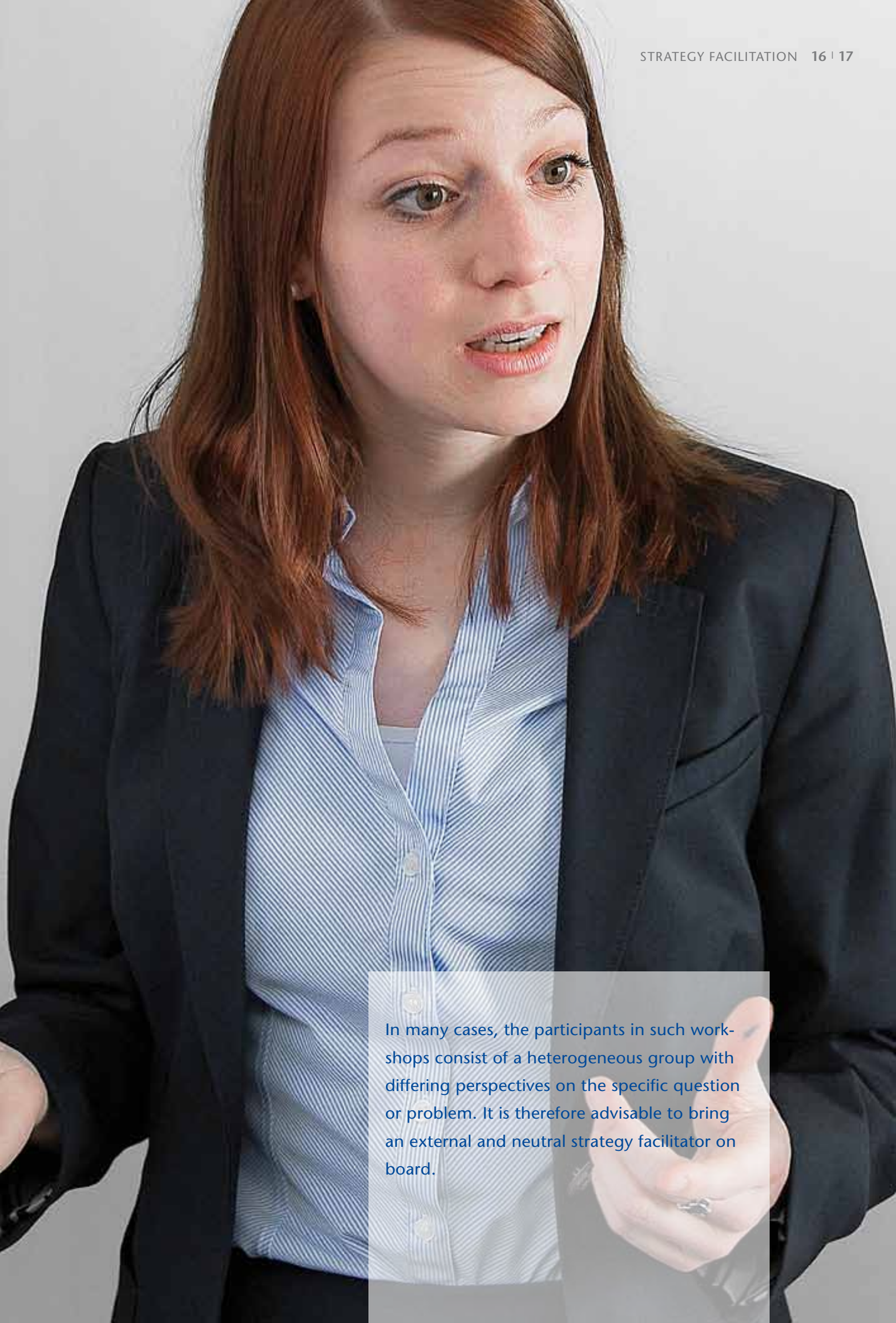

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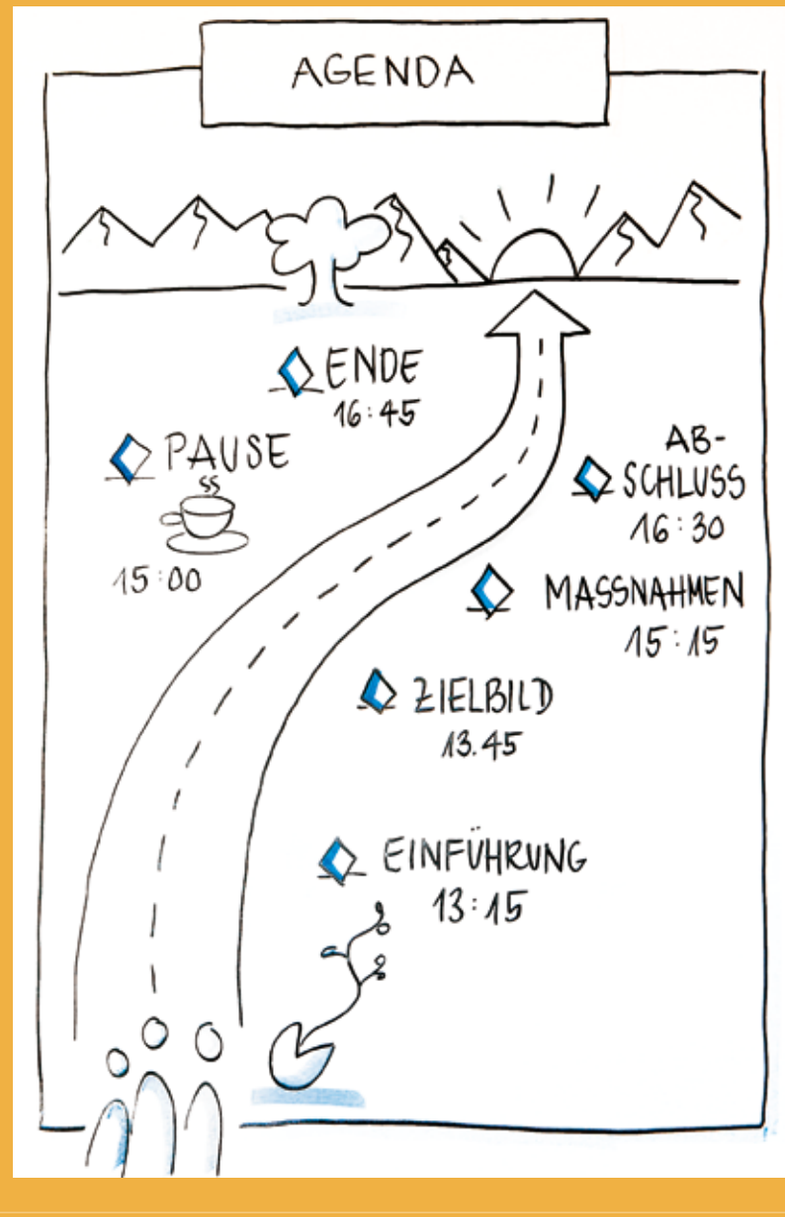
Fig. 1: Agenda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13:15

basis for joint action within a relatively short period of time.

Example 1:
UNDERSTANDING DIFFERING POINTS OF VIEW AS A STRENGTH

A pan-Swiss trade association whose membership comprises many large and small organisations in public service provision, has been grappling with a complex technology-related issue for some time. A number of strong and divergent views have emerged within the association. Since the issue is becoming increasingly topical, a consensus must be found quickly so that the necessary measures can be defined and implemented. The management at the association therefore decides to conduct a strategy workshop.

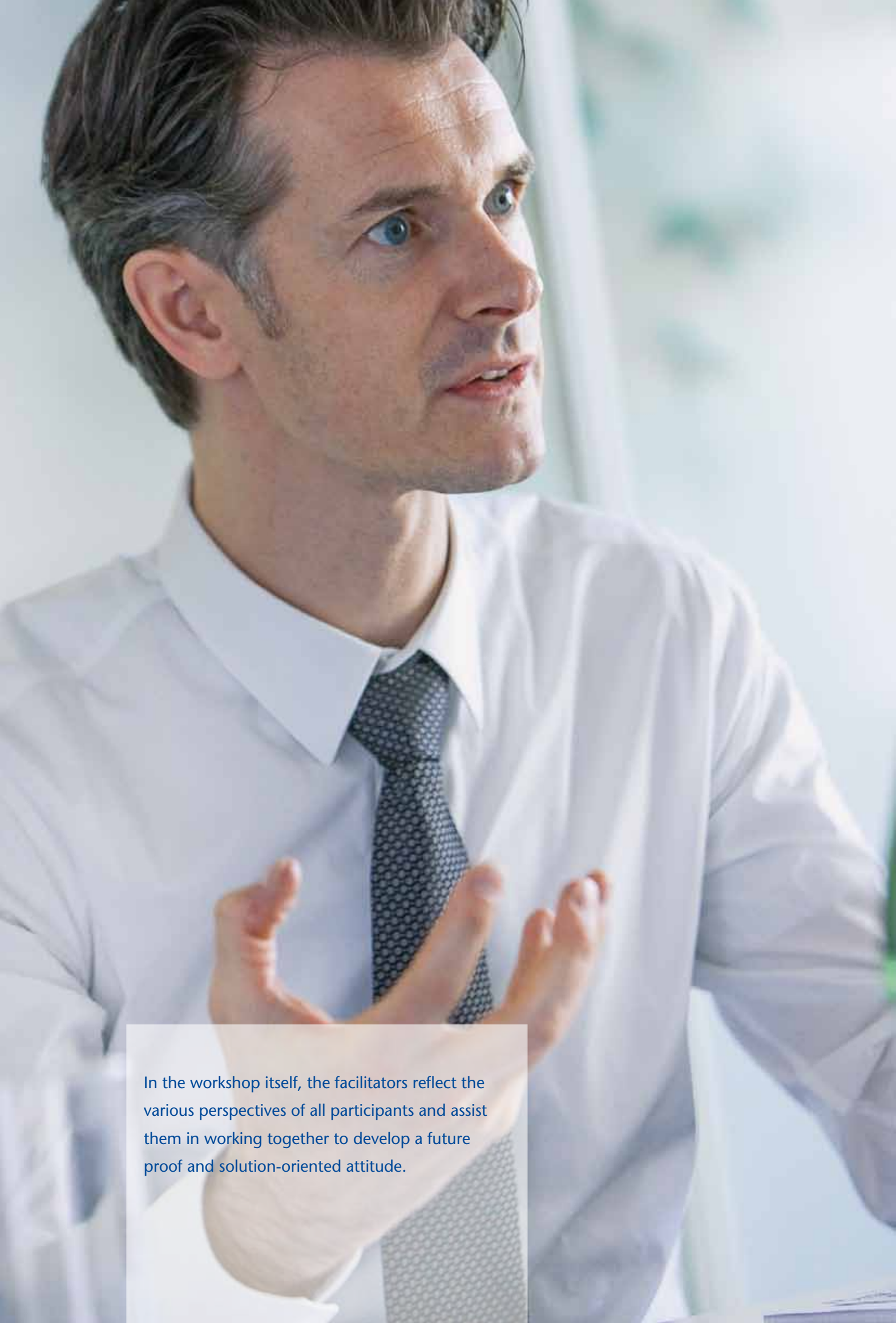
Owing to the different positions within the group as well as the complexity of the issue, a professional and neutral facilitation team is brought on board. This team comes with a proven set of methods as well as a high level of expertise in the domain in which the organisation operates. And thus the moderators can optimally define the topics before the beginning of an extremely time-limited workshop, which is only attended by managers. During the workshop, they can use their knowledge of the environment to tackle the respective issues and to ensure continuous and effective dialogue. The facilitation team does not see the diverging opinions among the workshop participants as a problem, but instead uses them as a resource for the group to jointly develop ideas and solutions on a sustainable basis. At the same time, it ensures that all participants have a chance to have their say.

At the end of the workshop, a target concept and concrete measures, including a realistic roadmap, can be defined and will eventually be supported by all participants.

Example 2:
DOMAIN EXPERTISE ENABLES A HOLISTIC VIEW

An industrial company has undergone rapid growth. As is typical for many industrial companies, the head of the development department would like to analyse the dominant phase-oriented development processes with his team during a workshop. In particular, he wants to identify optimisation potential in conjunction with the agile methods currently being applied. On recommendation, he brings in some accomplished moderators for support.

The external consultants have the appropriate domain expertise and in particular can draw on a wealth of experience in the field of agile development in the phase-oriented environment of industrial companies. The head of development plans to conduct the workshops with the participation of his line and project managers.



In the workshop itself, the facilitators reflect the various perspectives of all participants and assist them in working together to develop a future proof and solution-oriented attitude.

However, in the preparation for the series of workshops, the facilitators recognise that this approach falls short. They recommend that, in addition to development staff the marketing and product management should also be involved as a matter of necessity. Only this approach allows all of the dependencies in the entire product development process to be completely identified. The facilitator team eventually organises and runs a series of workshops with the participation of experts from the relevant fields.

In the facilitated workshop, the group succeeds in identifying improvements throughout the entire development process and in defining common visions, objectives, fields of action and appropriate timetables for implementation.

Example 3:

PROMOTING A SOLUTION-ORIENTED ATTITUDE

A company in the public sector that is principally active in the field of data analysis, makes use of numerous and sometimes highly specific technologies. These technologies are supported by a small team. An employee survey reveals irregularities within the team, as well as between the IT and specialist departments. There is a growing risk that only a few individuals possess the know-how and in time these people will leave the company. The personnel manager recognises the problem and entrusts professional strategy facilitators to organise and lead a workshop. The objective: To formulate a vision of how work processes can be optimised for everybody in the future. Moreover, it is intended to create a motivated team from the heterogeneous group.

In the workshop itself, the facilitators reflect the various perspectives of all participants and assist them in working together to develop a future proof and solution-oriented approach. Thanks to the strategy facilitators' domain expertise in the public sector area, the current target concept remains realistic and achievable. Finally, at the end of the workshop, the participants have succeeded in drafting a long-term vision, identifying action areas and defining clear roles.

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THE METHODS FOR THE RIGHT SOLUTION PROVIDER

The tendering procedures in both the public and private sectors demand a thorough knowledge of business analysis and broad domain expertise.

In addition to practical experience in the specific procedures and unique features of the domain, large invitations to tender require in-depth know-how of business analysis.

BY CHRISTIAN EICHENBERGER AND MEHMET YIGITBAY

A clean and professional tender submission represents the indispensable foundation of every procurement project. If requirements are incorrectly weighted, unclear or incompletely formulated, the evaluation will inevitably result in products and solutions or implementation partners that fail to fit optimally. In any case, it will become all the more difficult to achieve the set goals. This threatens not only a costly misallocation of funds, but also a nagging loss of time within a particularly competitive environment.

To a marked extent, this also applies to the public sector. However, depending on the order volume, particular attention must be paid during the evaluation process to legal regulations *(compliance)* of a greater or lesser magnitude. Notably, in invitations to tender that are subject to WTO regulations, incomplete or merely poorly formulated terms of reference, can result not only in an incorrect evaluation, but can also lead to lengthy and thus costly delays as a result of legal proceedings for violations. Moreover, the time needed for a thorough evaluation is correspondingly large. The various deadlines and intense preparation of documents mean that a minimum of six months can be expected, for example, for WTO tenders. This is assuming that the tender documents are complete and have been consistently prepared and that the specific contractual task is unambiguously formulated.

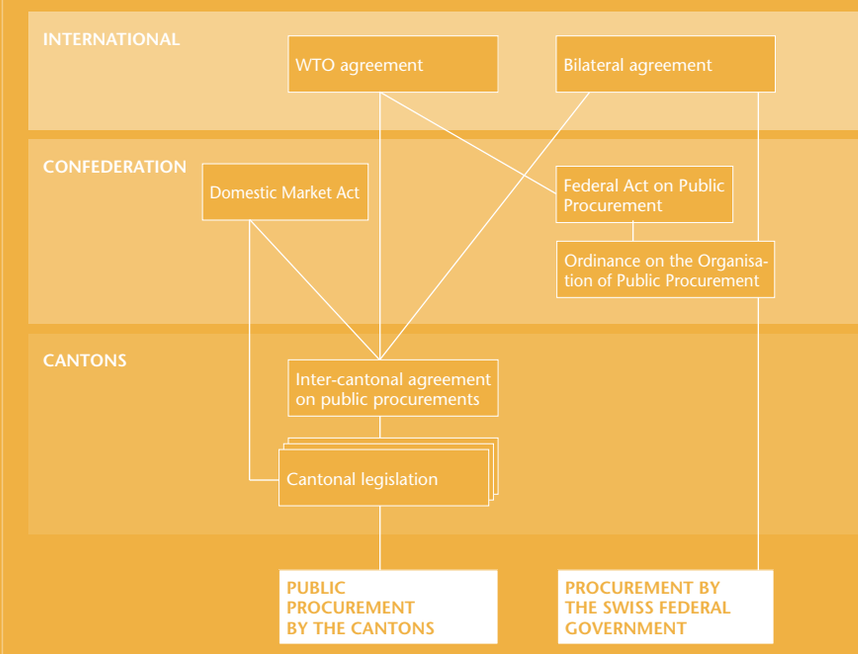
Indeed, the substantial resource requirements pose a major challenge for many public sector organisations. Even if the required know-how is internally available for the professional preparation of the tender, normal day-to-day business rarely permits an opportunity for appropriately qualified staff to be dedicated to such an extensive additional task. This is where external specialists can provide remedy. However, in addition to profound know-how in business analysis for the methodical and clearly structured preparation of specifications and well formulated questionnaires, these consultants also require extensive domain expertise in the public sector in general and in particular in the various tendering procedures that can arise in this area.

The assessment system is critical to success, above all in the case of WTO tenders. The various requirements must be weighted transparently and appropriately and on no account, create misguided incentives for the issuer of the tender. An additional monetary quantification serves as a decision-making basis for the selection of the right tendering procedure. If it turns out that no WTO tender is required, then this can result in significant cost savings.

In this area, external specialists from the private sector, can provide additional benefits to organisations in the public sector. For example, they know the tender procedure from the perspective of

In invitations to tender that are subject to WTO regulations, incomplete or merely poorly formulated terms of reference, can result not only in an incorrect evaluation, but can also lead to lengthy and thus costly delays as a result of legal proceedings for violations.

Fig. 1: Legislative framework in the public sector



the other side and they know precisely where to find the typical «loopholes» that can be used by the bidders to their advantage. External consultants can also provide a further advantage in terms of tacit knowledge. While internal specialists may consider many details to be self-evident and fail to formulate these sufficiently clearly in the tender, external consultants will immediately recognise gaps in completeness and ambiguity. Here, aided by their business analysis methodologies, they can bring their tacit knowledge to bear.

Example 1:
EXTENSIVE WTO TENDER WITHOUT LOOPHOLES

For the development of a specialised application, the responsible project leader at a federal office decides to bring in external assistance through an invitation to tender which is subject to WTO guidelines. In the course of the initial work, it becomes clear that the employees assigned with the task are reaching the limits of their resources, meaning that an optimal evaluation process can no longer be guaranteed.

As a first step, the consultant, who is specialised in procurement and business analysis, conducts a joint review with the affected departments and IT managers of the already compiled documents on the system requirements. During this informal quality control it emerges that the document is out of date in a number of areas and the requirements have changed since it was first compiled. Because a high quality analysis is the mandatory basis for a successful submission, the project manager decides to commission the external experts to carry out an entirely new analysis of requirements.

In an iterative process, the professional and technical requirements are identified together with stakeholders. With a methodical approach and broad experience in the clear formulation of requirements, as well as a comprehensive knowledge of the public sector, the consultant helps to ensure completeness and unambiguity. This long-standing practical experience can also be effective in the definition of the evaluation matrix. Firstly, the key requirements must be sufficiently weighted and rendered in a measurable, as well as testable form for the evaluation team. Secondly, efforts must be made to prevent the creation of misguided incentives. These can result not only in the wrong choice of provider, but can also be used by the bidders to conceal the actual costs. As external assistants from the private sector, the consultants know these «loopholes» and can eliminate them to a large extent.

To ensure success within this laborious tendering process, is the consultant's comprehensive knowledge of methods with respect to requirements engineering, combined with his broad knowl-

Also critical to success in this tendering procedure is the profound industry knowledge of the field of public transport on the part of the business analyst. With this knowledge he can ask the right questions also in order to comprehensively gather undocumented knowledge and then unambiguously document this for the specification of the new system.

edge of the public sector and the specific bid regulations that apply in the area. This enables the preparation of transparent tendering documents, which the federal office or, respectively, the body responsible for this step in the evaluation process at the Federal Office for Buildings and Logistics *(FBL),* can use to precisely determine the most economically advantageous offer and to award the contract accordingly.

Example 2:
PRAGMATIC EVALUATION OF A STANDARD SOLUTION

A federal office plans to introduce a new communication solution in order to interact more directly and quickly with its customers. The invitation to tender for this sub-project in a comprehensive communications infrastructure, is handled by an external project leader. He is responsible for numerous sub-projects and has broad experience both in the evaluation of ICT solutions, as well as in tendering processes in the public sector. Because the requested tasks can be carried out using standard solutions, it is quickly evident for the consultant that no costly and time-consuming WTO procedures will be required for the simple-to-introduce solution. The project leader thus pursues a pragmatic standard procedure for the procurement of such items. Already at the outset of the project, this quick decision saves the office a great deal of unnecessary work.

Using an evaluation tool and aided by Internet-based research, the project leader compiles a structured long list of all possible providers offering these products in this area. The detailed requirements are then defined together with the various stakeholders at the federal office. Thereby, he assumes the role of an independent external consultant, whose critical questions, among other things, ensure that nice-to-have features do not drive up the price unnecessarily.

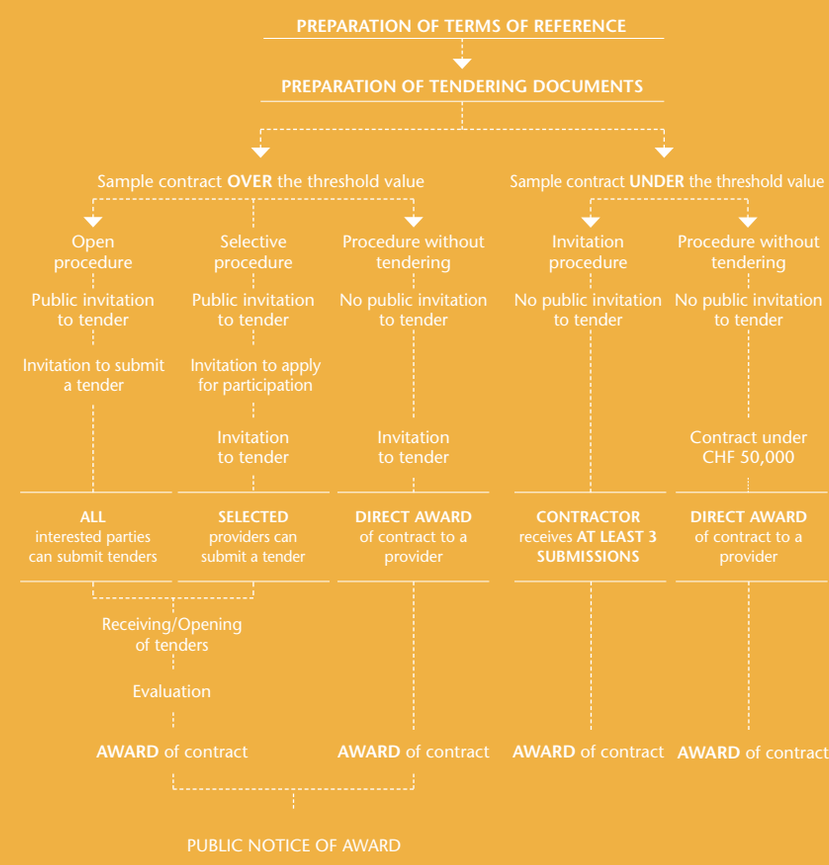
The short list is created by comparing the consolidated requirements *(criteria)* with those on the Internet or in the requested specifications for the solution deriving from the product documents. In consultation with the stakeholders, this is then used to make contact with the eligible candidates, who are compared and evaluated in a structured process.

Finally, as a last verification step before the final decision, a reference visit is conducted at a related organisation in the public sector. The system evaluation can be completed extraordinarily quickly and successfully, thanks to the pragmatic approach and the deep technical know-how of the expert.

Example 3:
BRINGING EXPLICIT KNOWLEDGE TO BEAR

A public transport company is looking to replace a host system. The impending retirement of the know-how carriers places the medium and long-term maintenance of the technical application into doubt. The responsible project manager decides to bring in external support for the entire evaluation process – from the preliminary analysis to concept planning, up to the actual evaluation.

Fig. 2: Schematic representation of the tendering procedure



The biggest challenge in this tendering process lies in amassing the full specialist knowledge of the last remaining know-how carrier on the business side. Above all, this entails making his tacit knowledge explicit and translating this in a structured manner into system requirements. For this task, the external expert can fall back on the necessary extensive methodological and practical skills in the areas of business analysis and requirements management.

Also critical to success in this tendering procedure, is the profound industry knowledge of the field of public transport on the part of the business analyst. With this knowledge he can ask the right questions in order to comprehensively gather undocumented knowledge that is self-evident for the specialist and then unambiguously document this for the specification of the new system.

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