



**Interview Case Study - managing change as a consultant**

This was the case study for an interview for the role of SaaS consultant.

In solving this I consider and describe the role of a consultant and Project Manager in an Agile context.

I investigate Agile and non-agile approaches but at the end of the day, all that was needed was a decision tree and a set of conversations.

The task was to create a decision tree and set of conversations.

**CONTENTS**

**Interview Case Study - managing change as a consultant**.....1

    PROBLEM .....2

    MY SOLUTION .....3

    ANALYSIS.....4

        Consultants Role .....4

        Project Manager Role .....5

        Clients Role .....5

        Questions to PM .....5

        Questions about the Dev team to understand risk as the Dev team need structure and predictability .....5

        Question about backlogs and progression in the plan: .....5

# PROBLEM

## ***Solution Consultant – Work Sample Test Scenario***

You arrive at work Monday morning to find the following email from your client, CloudStare International, in your inbox:

“Hey, I just talked to my boss. Not only does he want us to go forward with the XYZ Widget, but this needs to be a high priority. He wants to see a working demo of this in three weeks!”

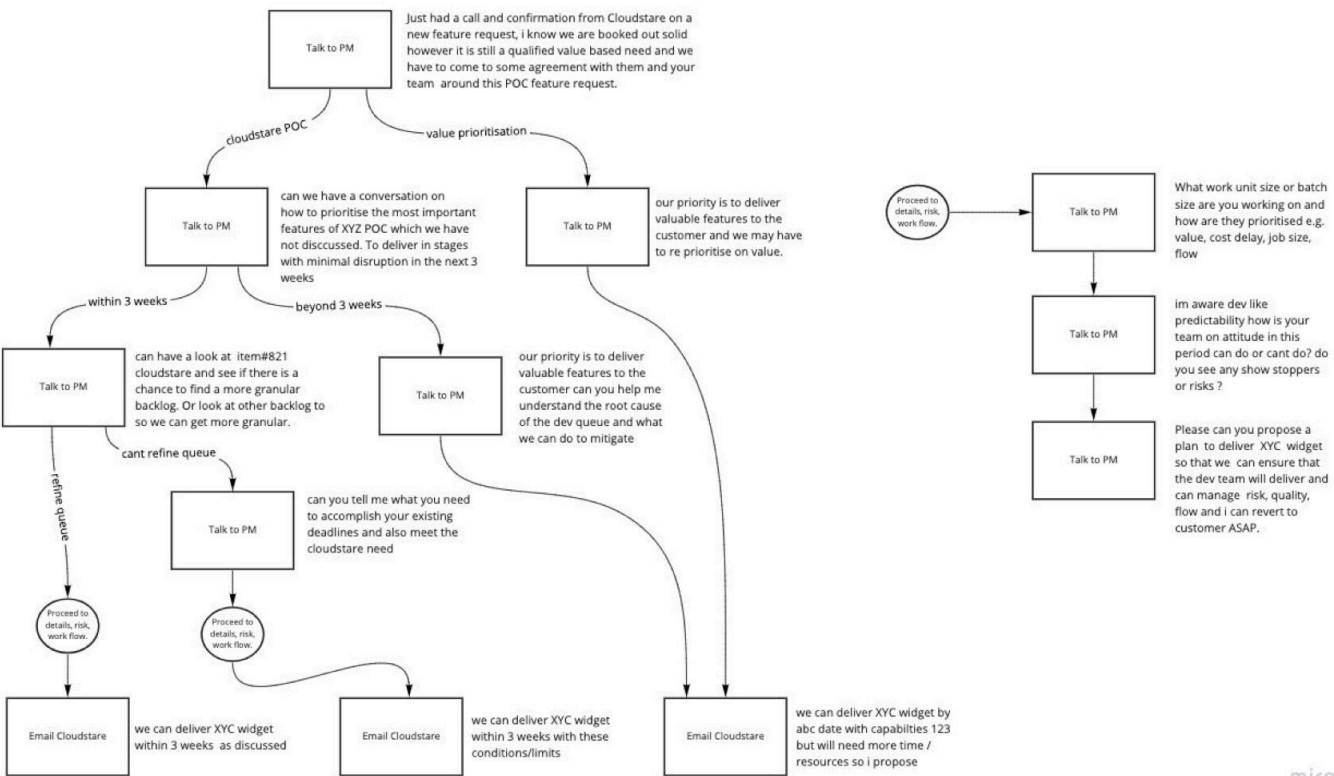
The XYZ Widget was a concept you and your client discussed on your last project call – and it is currently just in the concept phase. You know that you’ll need development to fix up a few aspects of the widget in order for it to work the way the client envisions – but this work has not yet even on their radar.

You take a look at the development queue – which is booked out solid for the next eight weeks. Here are the items in the queue they (the Product Manager and their developers) will be working on concurrently over the next three-week time frame:

Item #	Client	Description	Time Frame
806	Cisco	Workflow improvements	2 Weeks
819	VMware	Catalog branding enhancements	1 Week
821	Cloudstare	Registration path auto-population	2 Weeks
810	Oracle	Speaker Request module	3 Weeks

**Task 1:** Draw a decision tree to show your process. Please label each node with the individual by role that you’ll communicate with and the information you are specifically soliciting from them. Please label each fork in the decision tree with the potential answers they could provide (assume good and bad scenarios). Each path in the decision node should end with communication (assume email) to the client. Please bring two paper copies of your decision tree to your interview. Here is a sample of a decision tree:

# MY SOLUTION



# ANALYSIS

**The problem we have 8 weeks of work crammed into 3 weeks of concurrent work, then an unplanned deadline for a demo to show in 3 weeks. The demo is for a POC that has not even been raised to the dev team. Have a discussion with all parties and show it as a decision tree with the end-point being an email to the client.**

So the way I see to solve the workflow is to get clarity and prioritize the tasks. The batch size of jobs is large and there are many unknowns. We don't have enough information to create an agile 'flow'. With more information, we can create a priority list as backlog to prioritize against the cost of delay and job size or other criteria.

The Agile approach for this is to get exactly what information is missing. This is by maintaining a focus on what value to be delivered, by creating "Why/what" statements, and from there prioritize the backlog and start to generate value towards the purpose with small increments of demos and retrospections( ie. break down to small batches of value creations). Identify what the solution is and iterate around that solution, not just on the task you are doing.

My role is as a consultant speaking to a customer and a project manager so lets first understand the objectives of these roles.

## Consultants Role

#1 middle man between client and organization

- Decide to give, get, let go
- Ensure agreement and reduce risks, that all will do the work
- Deliver and delight the customer

### Consultants Objective:

- to be clear on the final outcomes needed buy the client based on business need, so I can give, get, let go
- able to understand the approach used by PM/dev, to ensure I'm confident why, how, when what I take to the Client
- moving parts scope, cost, quality, time and to get more agile on scope/priorities for client
- get agreement from PM/Dev to understand they won't flake out and project fail as understandings are not clear and needn't fail.
- keep all deadlines with a valuable delivery and accomplish early and valuable deliveries to the customers, increase quality and probably increase customer satisfaction,

## **Project Manager Role**

- Focus is work units
- Clients deliver on time, budget, resource
- Bandwidth

## **Clients Role**

- Needs to see business requirement met to deliver value
- Pragmatic doesn't care how it's done and wants the consultant to sort this out
- Is the business decision-maker who wants results and continued partnership with a vendor

## **Questions to PM**

- Can we prioritize to clouds our work queue to iterate around the XYZ solution, not just the tasks you are doing?
- Can you deliver to the requirement?
- How can we work to deliver stage by stage?
- What can we do to meet the needs?
- If you can't do this what can you do that I can tell the client?

## **Questions about the Dev team to understand risk as the Dev team need structure and predictability**

- Ask what is the team attitude can do or can't do?
- If you went of schedule will you be adversely affected?
- How will it impact other projects?

## **Question about backlogs and progression in the plan:**

Root cause questions:

What work unit size or batch size are you working on and how are they prioritized e.g. value, cost of delay, job size?

How can you get a more granular backlog, so we can increase flow?