

Ten golden rules for optimising your engagement with the business

Every business engagement landscape is different, and you need to have an adaptable approach to engaging with your business users. This guide is aimed at technical project managers with the responsibility for delivering IT solutions to business communities.

10 golden rules for optimising your engagement with the business	
1	Engage with the unsung heroes – the real users. Primary Stakeholders are usually individuals who represent an area or department such as HR or Marketing. Although they may be influential they may not be aware of the practical problems that are being tackled and overcome on a daily basis by the 'coal-face' staff. Battle your way through to get access to those unsung heroes.
2	See things with your own eyes. Wherever possible get to see business processes in action – don't rely on process maps written by consultants. The chances are that reality is somewhat different.
3	Get business users appointed into the governance groups. Write terms of reference to confirm and get commitment of their responsibilities. It is important to get them involved as part of the project delivery, not just customers of the result. Many project boards and steering groups have a disproportionate representation of financial controllers and IT managers. Challenge this if you come across it.
4	Build a team with strong interpersonal skills. Although watch out for developers doing favours for business users and adding un-agreed functionality! The more people in your team who can build strong professional relationships with the business will lead to a better understanding of their real needs and priorities.
5	Cut out communication gatekeepers. It may be necessary to have layers of communication for practical purposes, particularly in large organisations. But, beware of information gatekeepers such as Business Analysts distorting the real needs. Breaking through established procedures may require patience and a step-by-step approach so work with these gatekeepers to get the access you need to your user community.
6	Get your project team co-located with your business users. With remote working and off-shoring and the high-cost of office space, this is often a priority that is overlooked. If co-location is an issue, raise it early. You're going to need more time to arrange for on-site visits, workshops and the inevitable problems caused by possible mis-interpretation of requirements. You may even need more resources to mitigate the loss of the co-location benefits.
7	A working system is worth a thousand reports. Don't tell people how you're doing, show them – warts and all! If you do this right from the start you will build greater trust, and you will crucially unearth problems at an early stage, avoiding later, costly rework. (See our making technology work tips – you need to make sure your build approach allows for early demonstrations).
8	Bonding isn't a dirty word. It is particularly important at the outset of a project to rapidly create a good relationship with your business customers. Your team will be leaning to work together as well. Organise an early project launch social event and get the business to choose what will work well for them. Don't wait until relationships break down before giving priority to team-

	building.
9	<i>Don't just visit the business when you want something.</i> Make regular visits to your business users to maintain a healthy relationship. If you only see the business when there are issues, you'll never understand what's working well for them and you'll never get much job satisfaction! Building a long term relationship is key to making the relationship a success.
10	<i>Try doing their job for a little.</i> There's nothing better than immersing yourself in the actual problem you're trying to solve. Take any opportunity to roll your sleeves up and help on the job – even if this means shadowing someone else. You'll learn so much more about the right solution if you see the problems from your business users' perspective.