

The background features a dark blue field with a network of white and green lines and dots. A prominent white arc is on the left, and a thick green line curves across the right. Vertical green lines are labeled with numbers 65.294 and 77.503. The Qubix logo is in the top left.

Qubix

Guidance Note:

Remote-Only Project Delivery Recommendations

April 2020

Key Issue: Can Projects Continue in a COVID-19 Era?

As the Covid-19 Virus transmits around the World, many clients question how practical and realistic it is to either commence or continue with an Enterprise Performance Management (EPM) or Analytics project. Thankfully, the digital age has provided many tools to address this challenge. Technology together with a change in how we collaborate around projects means we can continue to deliver projects successfully, and most likely with greater efficiency.

In this paper, we outline the impact of remote delivery on Enterprise Performance Management and Analytics projects, with a specific focus on client impact, and present a framework to maximize the success of remote project delivery.

Recommendation Highlights

- As long as clients adopt new ways of working, projects can continue with minimum to no disruption.
- The amount of time spent on a project, and therefore the client resource commitment, will likely be lower overall when compared to a traditional project approach as a result of online efficiencies.
- The pattern of client involvement in a project will flatten across the duration of the project, in comparison to traditional projects, where client involvement tends to be higher at the start.
- Expenses such as travel, generally associated with project delivery will be lower, or non-existent.
- Qubix has successfully completed several remote-only projects for clients in many different countries, including clients in the USA, the UK and as far away as Fiji.

Background

Businesses will be significantly affected in the short and medium-term by the Coronavirus outbreak. Many teams will have different working patterns and additional non work-related responsibilities. Additionally, the significant majority, if not all team members, will be working remotely and will be geographically diverse; some in different countries and many in different time zones.

However, by adopting and embracing changes in the way we communicate and jointly deliver projects, we can proceed effectively with these programs, to help clients get ahead of the curve and gain a competitive advantage when the post COVID-19 "New Normal" begins.

The next section provides our current thinking on impact to the EPM/ERP and Analytics initiatives, which is then followed by the Qubix framework and latest thinking for successful remote project delivery.

Project Impact

Each client is at a different stage of their project, with varying degrees of scope and program complexity. Still, in most cases, the table below illustrates our current best thinking on the impact of a remote-only project:

Project Phase:	
PREPARATION	
Activity Area:	<ul style="list-style-type: none">▪ Business and Requirements gathering.▪ Resource planning.
Change Impact of Remote Delivery:	<ul style="list-style-type: none">▪ Questionnaire provided to client to establish key areas such as Business Process, FP&A calendar, business requirements and reporting requirements.▪ Resourcing calendars are produced and stored in a shared area to enable all stakeholders have access to availability.

Project & Client Time Impact:	<ul style="list-style-type: none"> The additional questionnaire and survey activities do not feature in the traditional face-to-face approach. Consequently, this additional activity does require the client to collate documentation and complete the on-line questionnaire and respond to survey interactions.
Duration Impact:	<ul style="list-style-type: none"> + 5 days

Project Phase:	
ASSESS	
Activity Area:	<ul style="list-style-type: none"> Project kick-off. Requirements gathering.
Change Impact of Remote Delivery:	<ul style="list-style-type: none"> Scheduling of attendees in line with availability and undertaken using audio/visual tool. The Q.bot (online survey tool) is the engine automating requirements gathering. Review and clarification sessions will be scheduled in line with availability calendar and conducted using online meeting tools.
Project & Client Time Impact:	<ul style="list-style-type: none"> As the Preparation phase has collected the underlying material and business requirements, the Assess phase focuses on reviewing and clarifying the material provided. This approach will reduce client involvement by at least three days.
Duration Impact:	<ul style="list-style-type: none"> - 3 days

Project Phase:

DESIGN	
Activity Area:	<ul style="list-style-type: none"> Design Specification produced. Data Source: Data & Metadata provision. Proof of Concept.
Change Impact of Remote Delivery:	<ul style="list-style-type: none"> Review and clarification sessions scheduled in via the Availability Calendar. Data Sources are identified during the Preparation stage with data and metadata files provided before commencing design using predefined templates and captured via Q.bot tool. POC initially shared and explained via audio/visual tool followed by Users accessing and evaluating POC as required in line with Availability Calendar.
Project & Client Time Impact:	<ul style="list-style-type: none"> Incorporating a Proof of Concept during a Design Phase provides an assurance and validates the proposed design. This step will add about two days to the process.
Duration Impact:	<ul style="list-style-type: none"> + 2 day

Project Phase:	
BUILD	
Activity Area:	<ul style="list-style-type: none"> Build and test.
Change Impact of Remote Delivery:	<ul style="list-style-type: none"> “Show & Tell” sessions are pre-planned in line with Availability Calendar. Consultants will prepare development work to share with SME’s in the show & tell sessions. Also, on-line access to our Project Management tool allows the client to review and monitor progress in real-time.

Project & Client Time Impact:	<ul style="list-style-type: none"> The effective and efficient use of time by pre-planning engagement between the consultant and the client reduces the timeline by at least two days.
Duration Impact:	<ul style="list-style-type: none"> - 2 days

Project Phase:	
TEST	
Activity Area:	<ul style="list-style-type: none"> User Acceptance Testing.
Change Impact of Remote Delivery:	<ul style="list-style-type: none"> Remote support pre-planned with bugs, issues and enhancements captured systematically, with resolution and testing managed through workflow and fix sprints.
Project & Client Time Impact:	<ul style="list-style-type: none"> Effective use of on-line tools for standardized capturing, ranking and resolving issues leads to an efficient way of working. This reduces the timeline by at least one day.
Duration Impact:	<ul style="list-style-type: none"> - 1 day

Project Phase:	
ADOPT	
Activity Area:	<ul style="list-style-type: none"> User and Administrator Training.
Change Impact of Remote Delivery:	<ul style="list-style-type: none"> Given the collaboration and involvement with the client's SME's the "Train the Trainer" approach is recommended. If the user community is remote from SME's, training can be undertaken by Qubix using online training tools using pre-prepared materials.

	<ul style="list-style-type: none"> The Qubix Academy platform will also be used to provide anytime, anywhere, any device access to content.
Project & Client Time Impact:	<ul style="list-style-type: none"> Because of the greater collaboration between the consultant and the client SME's, and use of the Qubix Academy online platform throughout the duration of the project, the time needed for this will be reduced by at least one day.
Duration Impact:	<ul style="list-style-type: none"> - 1 day

Qubix Suggestions

We recommend the following ideas and suggestions to fully embrace a remote-only program delivery.

1. **Set expectations about honouring commitments:** when working remotely, we cannot walk across the office and apply our powers of persuasion and influencing skills to encourage colleagues and stakeholders to deliver upon their commitments. Therefore, we should collectively agree that deadlines and milestones will be honoured and met. The methodology and approaches discussed later in this document provide a robust accountability model; however, it is still dependent upon people doing what they said they would do.
2. **Embrace online intelligence:** real-time project status reporting provides stakeholders with a wealth of information that can provide reassurance and comfort. Don't wait for a weekly status report; using the intelligence and information available to keep abreast of the project status presents an excellent opportunity to take any actions at the earliest opportunity.
3. **Maintain the collaboration and engagement:** when faced with a long "to-do list ", it is tempting not to join planned sessions such as "Show & Tells" or Project Steering Group meetings. Remote project delivery does require a change in mindset and indeed committed diary and time management to ensure stakeholders maintain the engagement and collaboration with the project team.

4. **Get to know the team:** the project launch is a great start to introduce everyone and make the project delivery personal. Those "water cooler" chats can't happen; however, keeping the video camera on when not screen sharing ensures we stay fully engaged with everyone feeling part of the team. We recommend weekly online project socials and, as described in detail later, the use of a project chat channel to keep the team connected.
5. **Client resource availability:** one of the most significant project risks generally faced is the availability of the client's resources and specifically the SME's. Given the planned and considered approach, remote delivery requires, it is imperative that the client commits resources in line with the project plan and records this in the availability calendar.
6. **Identify & protecting Golden Hours:** Golden Hours are when multiple regions are online at the same time (eg 9am until 11am GMT). Everyone ensures & agrees to keeping the Golden Hours limited to meetings only between those on different time zones. This way you don't end up with a 2 hour meeting in your Golden Hours which could easily take place say in the afternoon, as all attendees are from the same time zone. This also means you are not then having that meeting at the expense of a meeting with other regions which then has to be pushed back 24 hours in order to align working hours (you missed the window). You could go further and make an agreement that only project meetings happen during those Golden Hours in order to protect that valuable time.

It is our view that projects can continue successfully with limited client resource impact. We would go as far as to say that the project may be delivered more efficiently with the more streamlined method of working we outline in our remote delivery frame described in the following section.

Remote Project Delivery Framework

Qubix has many years' experience working remotely globally on project programs across our global offices. We estimate that in more than 70% of our engagements, both our consulting teams and our clients' business teams are geographically dispersed. We have also completed several projects with a remote-only delivery model in countries all over the world including the USA, UK and as far away as Fiji.

Given this experience, we have created several proven models and frameworks for remote program delivery that will make project delivery in a Covid-19 era successful.

Remote Project Delivery Pillars

- **Remote project delivery is more than replacing face-to-face meetings with virtual meeting tools.** The whole approach changes to become more proactive, with the use of online collaboration tools, such as intelligent survey apps which add additional rigour and robustness to the project phases.
- **Preparatory work is effective and efficient with a template driven approach.** We know the questions to ask; therefore, we provide our clients with a comprehensive online questionnaire app (we call Q.bot) that underpins the requirements gathering activity. The Q.bot is smart and covers a broad spectrum of discovery topics such as data sources, business processes, chart of accounts financial drivers and reporting needs to name a few.
- **Upfront training inspires the business users.** Business users often have had little or no exposure to EPM solutions which limits their ability to envision a future state. To address this, we undertake training upfront on a generic solution. This training approach provides the user community with an opportunity to see and feel how their final solution will operate and to contextualize the questions they may be asked when interacting with the Q.bot.
- **The agenda for meetings is predefined to make our collaboration as effective and efficient as possible.** All virtual sessions will follow a pre-agreed agenda with pre-prepared content. Each session will include the desired outcomes of the meeting. Time is precious and given that the virtual session may be working across different time zones and patterns, this new approach will maximize the value from our interactions.
- **Material and documents available 24/7 to the team.** All projects documents and materials are version-controlled and accessible to all project team members irrespective of their working patterns or time zones in a secure manner. This approach to sharing allows the team to at work at different times of day with the same source documents and supports a flexible and agile way of meeting the project's needs and deliverables.

- **Live Resource Calendar to share working patterns and availability.** The virtual team must know who is available and when enabling online discussions and meetings to be planned, and when required on an ad-hoc basis to address specific questions. A Resource Calendar provides the team to share their working patterns and availability with all stakeholders.

- **Live Project Chat Channel.** This will enable quick interactions and clarifications to take place at speed and, where required, to act as a record to capture guidance or decisions. Each team member will have a secure chat app that will work on their mobile device or laptop. This channel also plays a crucial role in change management and program comms.

- **Daily Stand-up to reinforce team engagement and collaboration.** Visibility and transparency of progress across the team is essential. Consequently, a daily stand up takes place to share the progress achieved, tasks planned and to identify any impediments affecting progress. The stand-up agenda is produced ahead of the discussion to ensure the meeting operates efficiently and facilitates contribution from all team members, including those that cannot join the session. When undertaking project delivery remotely, daily stand-ups are imperative to ensure the project remains on-time mitigating any delivery risks.

- **Online Project Analytics that provides complete visibility and insight.** Traditionally a weekly Project Status report presents senior stakeholders with project status updates, and communicates risks & issues. In the Qubix model, all plans, risks & issues and resource utilization is available in our online Project Management tool. Stakeholders are encouraged to review the online analytics available regularly.

- The project analytics available online include:
 - Online project tracking providing full visibility of the project tasks and their associated progress

 - Alerts and notifications as part of a workflow process and relating to specific backlog tasks and actions

- Analysis of categorized key project metrics allowing a holistic and detail view of the overall project
- The ability to post, update and view daily stand up records allowing full collaboration and visibility at a task level.

The Technology Enablers

Conventional wisdom suggests that a disparate team will result in lower productivity, isolation and a degree of detachment from the Project Team. However, the tools included in the Qubix framework ensure that is not the case; indeed, in our experience, the tools available increase productivity, and make engaging with others much more straightforward. Within our framework, we don't take a one "size fits all" approach. We use a range of solutions to deliver our projects successfully.

The four core platforms that make the Qubix approach to remote projects are:

1. **Online visual and audio tools:** these include tools such as Skype, Teams Google Meet, or Zoom. We work with any of these tools. Activities such as workshops, daily stand-ups, show & tell sessions and ad-hoc discussions will use such tools throughout the project cycle. We also record sessions allowing the materials to be shared with non-attendees seamlessly or, to aid as a reference for further action and activities at a more convenient time.
2. **Wrike – Project Management tool:** Wrike is our solution of choice to manage our projects. This is because Wrike is more than a Project Management tool; we use it to share Daily Stand Up records, Risks & Issues logs, UAT output, recording and actioning Backlog items and sharing meeting actions. Wrike is secure, enable access by role, and provides "conversation" threads that are essential for giving future context to a decision or issue.
3. **Google Suite:** Google Drive provides an around the clock, secure document repository accessible to team members anytime on any device. Google Docs is one of the applications included in G-Suite and enables all parties involved to edit, comment, or provide feedback on documents as needed. Collaboration across all locations and teams is done in real-time with

Google Docs and this approach of delivering real-time document access, commenting, and editing capabilities increase project efficiency.

4. **Smart survey app (Q.bot):** Formerly called the "Needs Analysis Bot" Qubix has been deploying intelligent survey tools for several years. The Q.bot works across all phases of the project, but its use during the requirements gathering phase is an excellent example of its utility. During requirements discussions, we will inevitably need to ask questions and clarify our understanding with supplementary and more detailed questions. Using the sophisticated logic offered by the Q.bot system, we can do this. We can also receive file-uploads, and the tool allows multiple people to respond to questions sets, all the time our consulting team is informed in real-time of responses.

Conclusion

There is no reason why projects can't continue by adopting the use of technology outlined in the Qubix approach and by modifying the strategy taken to increase timeliness of communications, project visibility and superior collaboration methods.

As we have outlined, the use of intelligent technology such as Q.bot, more significant deployment of templates and critical project documents as part of our preparatory work makes remote project delivery effective and efficient. Any additional time required to undertake tasks necessitated by remote delivery is offset by the time savings delivered by working in a template-driven, planned and modern project framework.

We believe there is clear evidence that remote project delivery does support the continuation of finance transformation projects without increasing cost or risk. It is entirely arguable that remote-only projects may be more successful in terms of their efficiency, quality, cost-effectiveness and time to deliver.