

Performance Intervention
Software Executive Briefing Center
Two-Week Briefing Preview

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Executive Summary

The Software Executive Briefing Center (SW EBC) program at IBM distributes a two-week briefing preview each week for interested parties within IBM Software Group and company wide. The distribution list for the preview is quite large, and the recipients range from product managers to business unit executives to vice presidents across all of the software brands and various business units.

The preview is a two-week snapshot of the clients that are scheduled for a briefing in the upcoming two weeks for each of the nine worldwide briefing centers. It is distributed via email and lists the dates of the briefings, the GEOs (geographies) where the clients are located, as well as the subject areas which will be discussed during the briefings.

There is a vast array of topics which are discussed at the nine worldwide SW EBCs; therefore, a high level overview listing only the five major software brands is given in the preview. An increasing number of preview recipients have begun requesting specific products to be listed separately on the preview rather than being lumped into the five software brands; however, that would open up hundreds of possibilities of topics to list in the preview each week.

The business unit executive who oversees all of the software briefing centers understands that if one specific product were to be added to the list, a number of other product areas would also potentially like to be included, which could quickly snowball into an unmanageable structure. He has no doubt the two-week preview could be of significantly greater value to the recipients, but to do so will require more thought and investigation into what is feasible and most beneficial for all involved.

Perception Analysis

- **The Sponsor**
 - SW EBC business unit executive

- **The Champions**
 - SW EBC business unit executive
 - Briefing center managers

- **The Stakeholders**
 - Briefing center team leads
 - Briefing managers
 - Briefing coordinators
 - The owner of the two-week preview
 - The recipients of the two-week preview
 - Business unit executives
 - IBM product teams
 - IBM sales teams

- **The origin of the need**
 - The need for this performance improvement originated with the sponsor - the IBM SW EBC business unit executive (BUE) - and the managers of the nine worldwide IBM SW EBCs.

- **Information needed to investigate the issues**
 - Survey a sampling of recipients of the two-week preview to see what could be added to make it of greater value.
 - Interview one senior briefing manager per software brand to discuss what topics they think should be added to the topics list.
 - Discuss possible technical improvement possibilities with the EBC technical team with regard to database and website enhancements.

- **Perceived costs**
 - The costs of the performance issue should be negligible. The issue stems from a process which is already in place and is working; however, it can use some revamping to enhance its usefulness.

- **Strategic Alignment**
 - The mission of the IBM SW EBCs is to sell more, faster. The proposed intervention does align with the SW EBCs' *values, norms and culture*. The *structure* is in place for a thorough investigation into the performance improvement. The interventions will quite likely improve selling *performance*, which is absolutely goal-directed and results-oriented. Likewise, the *environment* is such that there should be little to no conflicts with the proposed interventions.

Performance Analysis

After administering a perception analysis for the Software Executive Briefing Center two-week briefing preview, a performance analysis was led by a) conducting surveys with a sampling of recipients of the two-week preview to see what could be added to make it of greater value, b) interviewing one senior briefing manager per software brand to discuss what topics they think should be added to the topics list, c) interviewing and observing the briefing coordinators and preview administrator to understand their constraints, and d) discussing possible technical improvement possibilities with the EBC technical team with regard to database and website enhancements.

Organizational Systems

Actual Performance

At present, the two-week briefing preview is administered by one person who receives briefing center-specific input from each of the nine EBCs each Monday. The briefing coordinator responsible for the scheduling of briefings in each EBC is who sends the input electronically each week to the preview administrator. The preview administrator then compiles all of the nine EBCs' data into one report and sends it via email each Tuesday to the very large distribution list.

Decisions for the two-week briefing preview are generally made by the briefing center managers and the briefing center BUE. The managers and BUE are not necessarily in tune with the demands on the briefing coordinators and preview administrator nor how their decisions affect the amount of time that has to be spent on the preview each week.

Numerically, the Software EBCs are doing very well. Through the first half of 2006, the SW EBC organization as a whole has delivered 710 briefings representing 53% of the full year target of 1340 briefings. The SW EBC organization has supported opportunities in 2204 accounts with 5287 clients attending. The associated potential revenue for the first half of 2006 is \$1.27B.

Client satisfaction has been very high relative to the target of 1.5 (on a 1 to 5 scale with 1 = Excellent). Briefing volume in the first half of 2006 was up 13% over the first half of 2005.

The clients of the SW EBC two-week briefing preview are those who have a stake in software sales. The distribution list for the preview is quite large, and the recipients range from product managers to business unit executives to vice presidents across all of the software brands and various business units worldwide. It is beneficial for the recipients of the email to see how often their products are being represented to customers in the briefing center and how their salespeople and GEOs are utilizing the beneficial tool which is the Software EBC organization.

Optimal Performance

Ideally, the Software EBC two-week briefing preview will reach out to more people and give more beneficial information so as to not only drive use of the briefing centers worldwide, but also to increase software sales as a whole.

Optimally, the increase in information delivered to the briefing preview clients will not hinder the integrity of the report by making it cumbersome, difficult to decipher, nor difficult to compile. The briefing coordinators and the preview administrator are already maxed out with workload, so an unmanageable structure is not an option.

Management Systems

Actual Performance

Currently, the SW EBC organization has established quite a number of committees for making decisions and disseminating information to each of the nine EBC teams. Some examples of the EBC committees are business development, go-to-market, briefing coordination, MarketBound database system, etcetera. For those common efforts which do not have a committee

association, the briefing center managers and BUE manage the decision making and disseminating.

Employees are somewhat empowered to act on their own, but the EBC organization has long been moving toward common practices among all centers; hence the creation of committees for so many topics.

The two-week briefing preview does not have a committee associated with it, nor does anyone desire there to be. Thus far, all decisions have been made by the briefing center managers and the BUE without there being cohesive decisions on all fronts. The preview administrator frequently receives opposing input from various sources about how to conduct the preview.

Optimal Performance

Optimally, the preview administrator is given more ownership of the preview and only one source from whom to receive input on the conducting of the preview.

Physical & Technical Systems

Actual Performance

In some ways, the work environment does inhibit performance of the two-week briefing preview. The briefing coordinators who submit their center's data to the preview administrator have so many other tasks that they are not always able to submit to the administrator on time. When the administrator does not have all of the centers' information on time, she is not able to send the preview on the designated day.

Likewise, the preview administrator receives suggestions from too many different sources, causing her to have to wade through emails and decipher whose suggestions she should take and whose she can let go. This causes stress and time management issues.

The briefing coordinators and preview administrator do have the tools and supplies needed to perform the tasks associated with the two-week briefing preview. All of the information needed to compile the report is located within the MarketBound briefing management system, and each of the employees has their own dedicated workstation from which to access the necessary information. The briefing managers have not always input all of the information, but the tools are there for the coordinators to find it.

Optimal Performance

Optimally, the briefing coordinators' and preview administrator's workloads are balanced such that getting time-sensitive information out is not a problem. The preview administrator has one contact - a briefing center manager or the BUE - from whom she receives suggestions and input on the management of the preview.

Human & Social Systems

Actual Performance

The culture within the SW EBC organization is results-oriented, progress-forward, and at the same time supportive and flexible. While these are all positive traits of an organization, since they result in frequent change, many members of the organization are constantly unhappy because they do not like change. The negative grumblings of a few can be felt by many.

In many instances, employees work in teams to solve problems - committees, EBC teams, etcetera. On one hand, the teamwork is a very good aspect of the EBC organization, but on the other, some of the team is frustrated by the decreasing level of autonomy they are given.

Optimal Performance

The SW EBC organization continues to make change for the betterment of the organization without making change just for the sake of change. Positive changes are made and accepted by all members of the organization.

Teamwork continues to be a focus of the EBC organization, but without taking away the individual's right to do their work as how they are comfortable and how they work best.

Gap Analysis

After performing perception and performance analyses, several gaps were discovered between the way the Software Executive Briefing Centers' two-week briefing preview is currently performing and how it should be performing. A table displaying those gaps is below.

| Actual Performance | Optimal Performance | Gaps between Actual and Optimal Performance |
|---|---|---|
| <p><i>Organizational System:</i></p> <p>Two-week preview only displays topics via the five major software brands</p> | <p>Two-week preview is more comprehensive by displaying more specific products</p> | <p>No apparatus is in place to automatically or easily capture specific products being presented in briefings</p> |
| <p>Recipients of the two-week preview are asking for more specific information to be listed</p> | <p>More specific information is listed and recipients are satisfied with the information they receive</p> | <p>Recipients of the preview are not being reached at the deeper level they desire</p> |
| <p><i>Management System:</i></p> <p>The Worldwide Software EBCs are bogged down by committees for decisions and change.</p> | <p>The Worldwide Software EBCs do not add any more committees to the ones already established.</p> | <p>Individuals who own various efforts are anxious to be given authority to evaluate and implement change themselves.</p> |
| <p><i>Physical & Technical Systems:</i></p> | | |

| | | |
|---|---|---|
| The preview administrator is not always able to send out the preview on time. | The preview administrator is always able to send out the preview on time. | The briefing coordinators who submit their data to the preview administrator do not have the time to chase down all of the details already incorporated into the preview. |
| The MarketBound briefing management system does not automatically capture the specific topics which are covered in each briefing. | The MarketBound briefing management system automatically captures the specific topics which are covered in each briefing. | There are no tools incorporated into the MB system to make researching the preview information automatic rather than manual. |
| Very few employees outside of the briefing centers have access to the MarketBound information. | More employees outside of the briefing centers have access to the MarketBound information. | Security and privacy reasons keep MarketBound access limited to very few employees outside of the briefing centers. |
| <i>Human & Social Systems:</i> Autonomy appears to be on the decline in the EBC organization. | Teamwork still reigns, but a healthy level of autonomy is still achieved. | Best practices and committees and teams have begun to take over the SW EBC organization. |

Although the WW Software EBCs were 3% over their target at the end of the first half of 2006, there is always room to grow. If the recipients of the two-week preview could view a more specific product set of what is being shown to clients in the EBCs, they could step up their efforts where they have low numbers, both increasing volume in the EBCs as well as increasing sales numbers for the company as a whole.

The first half reports show that briefing volume was up by 13% in the EBCs in 2006 over the first half of 2005; however, new centers were opened up in Germany and France in the last quarter of 2005, so the 13% is an inflated

number due to the organization having two more operating centers than they had at this point last year.

Intervention Strategies

After conducting perception, performance and needs analyses, five gaps which require intervention were identified within the Software Executive Briefing Center organization's two-week briefing preview initiative. The intervention strategies, complete with details, rationale, and an implementation schedule, are below.

Organizational System

Implement an apparatus within the MarketBound briefing management system to automatically capture specific products being presented in briefings.

- Description
 - An apparatus will be added to the Visitor Information Sheet (VIS) within the MarketBound system which captures specific products being presented in the briefing. A new section will be added to the VIS consisting of a drop-down menu, from which the briefing manager will be able to select as many topics/products as are being presented during the event. The drop-down menu will ensure uniformity between all centers for what each topic is named.
- Rationale
 - Based upon a comprehensive understanding of the situation ✓
 - Carefully targeted ✓
 - Sponsor-based and supported ✓
 - Employs a team approach ✓
 - Cost sensitive ✓
 - Aligns directly with organizational priorities ✓
 - Well investigated and weighed against options ✓
 - Powerful ✓
 - Sustainable ✓
 - Takes implementation into consideration ✓
- Schedule
 - August 8 - gain MB committee approval
 - August 9 - MB technical team begin development
 - August 11 - test environment ready for committee testing

- August 15 - roll out to production

Survey recipients of the two-week briefing preview to discover at how deep of a level the preview should display products.

- Description
 - Since the recipients of the two-week briefing preview are not being reached at the deeper product level they desire, a survey will be submitted to the entire distribution list to solicit input to determine how deep the products should be listed on the preview.
- Rationale
 - Based upon a comprehensive understanding of the situation ✓
 - Carefully targeted ✓
 - Sponsor-based and supported ✓
 - Employs a team approach ✓
 - Cost sensitive ✓
 - Aligns directly with organizational priorities ✓
 - Well investigated and weighed against options ✓
 - Powerful ✓
 - Sustainable ✓
 - Takes implementation into consideration ✓
- Schedule
 - July 31 - survey is approved to send
 - August 1 - survey is sent to distribution list
 - August 8 - survey results are tallied
 - August 9 - product brand experts are consulted to determine which products are included in the preview
 - August 10 - product list is given to MB technical team

Management System + Human & Social Systems

The individual who owns the two-week briefing preview is given authority to manage the implementation of the interventions.

- Description
 - Due to the fact that the Software EBCs are currently bogged down by committees in order to incorporate decisions and change and that staff members do not want to add any more committees to the ones already established, the owner of the preview will be given the authority to manage the implementation of the interventions. This will cut down on multiple staff members having to manage the effort, and will increase motivation across all centers.

- Rationale
 - Based upon a comprehensive understanding of the situation ✓
 - Carefully targeted ✓
 - Sponsor-based and supported ✓
 - Employs a team approach ✓
 - Cost sensitive ✓
 - Aligns directly with organizational priorities ✓
 - Well investigated and weighed against options ✓
 - Powerful ✓
 - Sustainable ✓
 - Takes implementation into consideration ✓
- Schedule
 - July 31 - the owner of the preview will take over and manage the schedule set forth in this document

Physical & Technical Systems

An automatic apparatus for compiling each center's preview information will be incorporated into the MarketBound Visitor Information Sheet.

- Description
 - The apparatus described under Organizational Systems will automate the briefing coordinators' efforts when compiling the preview information, therefore taking less time than previously having to manually enter each VIS and decipher what topics/products were being presented in each briefing.
- Rationale
 - Based upon a comprehensive understanding of the situation ✓
 - Carefully targeted ✓
 - Sponsor-based and supported ✓
 - Employs a team approach ✓
 - Cost sensitive ✓
 - Aligns directly with organizational priorities ✓
 - Well investigated and weighed against options ✓
 - Powerful ✓
 - Sustainable ✓
 - Takes implementation into consideration ✓
- Schedule
 - August 10 - email with a job aide is sent to each briefing coordinator detailing the new process for compiling the preview information
 - August 15 - briefing coordinators begin using the new, automatic functionality within MarketBound

Read-only MarketBound access will be given to a select group of individuals who also receive the two-week briefing preview.

- Description
 - Since security and privacy reasons keep MarketBound access limited to very few employees outside of the briefing centers, read-only access will be given to the business unit executives and their administrative assistants who already receive the briefing preview. That way, they will be able to get further detail on certain briefings if need be, and they can disseminate information to their teams as necessary.
- Rationale
 - Based upon a comprehensive understanding of the situation ✓
 - Carefully targeted ✓
 - Sponsor-based and supported ✓
 - Employs a team approach ✓
 - Cost sensitive ✓
 - Aligns directly with organizational priorities ✓
 - Well investigated and weighed against options ✓
 - Powerful ✓
 - Sustainable ✓
 - Takes implementation into consideration ✓
- Schedule
 - August 1 - business unit executives and their administrative assistants are determined
 - August 4 - Lotus Notes IDs of those who will receive access are sent to the MB technical team to add as read-only MB users
 - August 8 - an email with the database doclink and instructions for use is sent to all new read-only MB users

Feasibility and Risk Analysis

| | Automate MarketBound VIS | | | Meet recipients' product expectation | | | Autonomy for preview administrator | | | Read-only MarketBound access | | |
|------------------------------|-------------------------------|---|-----------|--|---|----------|------------------------------------|---|----------|------------------------------|---|-----------|
| | R | W | RI | R | W | RI | R | W | RI | R | W | RI |
| Cost effectiveness | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Strength of support | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 1 | 2 |
| Organizational change impact | 2 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Barriers to implementation | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 5 | 10 |
| # steps to implementation | 2 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Available resources | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Dependency on time/urgency | 2 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| # sites/functions affected | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| # people/groups affected | 2 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| | | | | | | | | | | | | |
| Total | | | 13 | | | 9 | | | 9 | | | 19 |
| Legend | | | | | | | | | | | | |
| R = Risk | Highly desirable/low risk = 1 | | | Moderately desirable/moderate risk = 2 | | | Not desired/high risk = 3 | | | | | |
| W = Risk Weight | High importance or value = 1 | | | Moderate importance or value = 5 | | | Low importance or value = 10 | | | | | |
| RI = Risk Index | RI = R x W (1 = optimal) | | | | | | | | | | | |

Automate MarketBound VIS

The automation of the MarketBound Visitor Information sheet will have the most impact on the Software EBC organization, as well as on the two-week briefing preview. It will take the most amount of time to implement and will have the most steps toward implementation, but ultimately it will be the intervention which takes the preview to the next level as far as ease of compiling information. Likewise, it will allow the briefing center organization to track products and topics in the monthly and quarterly reports. This step will involve some training of the briefing managers and briefing coordinators, but the training should be minimal and can be rolled out online to the worldwide audience at little to no cost. Additionally, the success of the automated functionality within the MarketBound VIS will rely on the briefing managers being vigilant in keeping their briefings' VIS's updated at all times.

Meet Recipients' Product Expectations

The implementation of a survey to the preview recipients in order to meet their product expectations in the two-week preview is both low risk and low cost and will have a great impact on the success and value of the preview. Ensuring an effective survey will be somewhat of a challenge, and likewise, ensuring involvement from as many recipients as possible with returned surveys will be an even bigger challenge. Hopefully, the preview recipients will be open to completing and returning the survey in a timely manner so that the product lists can be researched and compiled in time for the rollout of the MarketBound phase of the intervention.

Autonomy for Preview Administrator

Giving autonomy to the preview administrator and allowing her to oversee the implementation of the intervention will have no cost and will have a positive impact on all involved in the organization. It will boost the administrator's motivation by being given ownership of her project, and likewise it will raise

motivation among the rest of the organization not to have to create yet another committee among the briefing center community.

Read-Only MarketBound Access

Granting read-only access in MarketBound to the business unit executives and their administrative assistants is a very easy phase of the intervention to roll out; however, its challenges lie in the security and privacy issues. Some people within the briefing center community do not give this step support because they do not want employees outside of the EBC organization intruding upon the MarketBound calendars where staff lists their vacation, appointments, etc. This will be overcome through support from the major stakeholders of the effort, however.

Evaluation Plan

Formative Evaluation

The performance improvement intervention will be assessed through formative evaluations which will include rolling out a test phase of the new preview process through MarketBound and with the new preview topics in place. A small number of briefing centers will test the new MarketBound functionality and preview data-gathering process, and the test preview will be sent to a sampling of recipients who will give their input on the new topics. The briefing managers and briefing coordinators will be given the opportunity to give their input as well on the functionality and ease of data gathering.

Summative Evaluation

The summative evaluation will be aimed in two directions: 1) The recipients will be surveyed four weeks after the change is implemented to see what percentage are more satisfied with the information they are receiving, and 2) the fourth quarter closed business numbers for 2006 will be compared with

those for 2005 to see if briefing center use and business opportunities have risen.

Data Collection Plan

Description of Data Collection Methods and Instruments

Data will be collected at various points during the intervention, mostly through surveys and some interviews. A small number of briefing centers will test the new MarketBound functionality and preview data-gathering process, and the test preview will be sent to a sampling of recipients who will give their input on the new topics. The briefing managers and briefing coordinators will be given the opportunity to give their input as well on the functionality and ease of data gathering.

Types of Data to be Collected

Quantitative and qualitative data will be collected for the summative evaluation. The recipients will be surveyed four weeks after the change is implemented to see what percentage are more satisfied with the information they are receiving, and the fourth quarter closed business numbers for 2006 will be compared with those for 2005 to see if briefing center use and business opportunities have risen.

Techniques to Ensure Validity and Reliability of the Instruments

In order to ensure that the performance intervention aligns with the vision, mission and priorities of the Software Executive Briefing Center organization, the briefing center business unit executive, as well as the briefing center managers, will review the evaluation instruments. Likewise, the performance improvement technologist will review them.

Reporting the Findings

The findings of the evaluations will be reported to the briefing center business unit executive, as well as the briefing center managers.