



# Project Resourcing Untangles the Who, What, When, Where of the Transformation Journey

## At a Glance

Resource considerations for organizations undergoing enterprise transformation can be dizzying. To tap into the solutions that project resourcing brings, forward-thinking CIOs:

- Define clear roles, responsibilities, reporting and decision-making authority
- Govern for a clearer path forward
- Champion organizational change management to quell anxiety
- Align project resourcing and methodology
- Optimize offshoring efforts

---

*As organizations digitally transform, they must determine who will do what, when and where. Meanwhile, fundamental business activities must continue while new processes, tools and skills are onboarded during digital overhaul. Clear and transparent alignment between transformation strategy and placing people and partners in the right roles is critical.*

Smart project resourcing keeps the organization's business operating effectively while equipping it with the right people and partners to enable it to succeed in its transformation journey. It enables the CIO to ensure necessary skills and experience are available to focus on transformation efforts while maintaining business as usual (BAU) and provides an opportunity to identify and fill gaps. Effective project resourcing looks beyond cost and considers resource needs after the transformation effort is complete. To this end, CIOs must think ahead and plan for the knowledge they need to retain to sustain BAU post-transformation.

Through all of this, CIOs must keep their mind on the goal of the enterprise transformation strategy.

### **Define roles, responsibilities and decision-making authority**

Building and maintaining an optimal resource mix for transformation efforts is critical for success. Defining roles, responsibilities and decision-making authority at the outset provides transparency and measurability. CIOs must identify the right skills, individuals and partners to achieve the vision while maximizing budget dollars. With these components identified, they can determine fixed and variable components of the labor pool, including temporary resources needed only during transformation efforts.

As team skill sets and composition are evaluated and onshore or offshore third parties are brought in, team

dynamics change. Subject matter experts may need to be pulled from their day-to-day job responsibilities to focus on the transformation effort, creating gaps in coverage that may need to be backfilled. Accordingly, new or revised team structures will be built.

## Govern for a clearer path forward

While a business can outsource work, it cannot outsource risk or responsibility, so building a strong governance structure upfront is paramount. CIOs must identify stakeholders and key players, and ensure a strong understanding and vested involvement for a governance structure that helps the organization:

- Stay on track and in lockstep with strategy
- Execute on different workstreams by providing the appropriate skills for the transformation
- Clear organizational barriers
- Account for the expected outputs of each function

From technology vendors to internal team members, organizations should take an “assume nothing” approach to governance so people clearly understand expectations from the start.

## Champion organizational change management to quell anxiety

Transformational change initiates a ripple effect as some impacts are not apparent on the surface. Anticipating the impact of change for both internal resources and external third parties and implementing organizational change management plans that positively address the impact should be important initial objectives for CIOs to ensure buy in and quell anxiety.

Fear of the unknown and possible job elimination can significantly hinder productivity if transformation ambiguity causes attrition. Creating transition plans to ease job security fears can save an enterprise

transformation. Candid discussions and communicating frequently about changes to responsibilities and job functions offers employees reassurance, helping keep key resources where companies need them to achieve transformation goals.

## Align project resourcing and methodology

CIOs should establish a methodology such as Agile or Waterfall to conduct the transformation, and determine KPIs to track progress, establish the team’s skill set and align project resourcing with all aspects of the methodology. Everything from timeline, budgets and costs to roles and responsibilities is aligned to the methodology. Defined levels of reporting are set through tools such as a RACI matrix, leaving no room for ambiguity in decision making. The methodology sets the structure for the transformation and reduces inconsistent processes. Successful transformation requires the CIO to implement the right quality measures and quality control, to communicate early and often, and to structure project resourcing to mitigate against “cliffhanger” deadlines.

## Optimize offshoring efforts

Repeatable components of transformation that have clear inputs and outputs lend themselves to offshoring. However, offshoring has its own benefits and challenges. CIOs must understand their team’s skill sets to make ideal offshoring decisions that fill resource gaps and offer cost benefit. When offshoring, organizations should define expectations for:

- Roles and responsibilities, including quality standards and relationship owners
- Communication protocols, including time zone differences and methods for communicating
- Service-level agreements, so progress and quality can be tracked and deadlines met

Well-defined offshoring responsibilities mitigate ambiguity and prevent tasks from falling through the cracks.

## Collaborate to gain an understanding of people impact

CIOs should collaborate with the C-suite and listen with the goal of understanding the “people” impact on each area. Team member involvement, impact to operations and planning for backfill resourcing should each be considered as they relate to the unique parameters of each C-suite member:

- **Chief compliance officer (CCO), chief risk officer (CRO) and chief audit executive (CAE)** — Ensure access is appropriately controlled as responsibilities and permissions are allocated to people or teams that would not normally have access. Resources must be appropriately educated on compliance and controls-related requirements.
- **Chief data officer (CDO)** — Changes to critical data models and data governance will be impacted. The CIO should collaborate with the CDO to secure data and incorporate any impacts to the data strategy in the plan.
- **Chief marketing officer (CMO)** — Digital transformation may alter the way a business’s customers interact with the organization. If an organization is not equipped to provide the necessary support for the new interactions, there may be poor user experiences. Ensuring the marketing plan is aligned with the transformation is key.

## What should companies do now?

While every organization’s transformation journey is unique, there are common features for how project resourcing boosts successful transformation, including:

- **Defined vision and expected value** — Organizations must go beyond meeting timelines and reaching a transformation “end” point. They must strive to improve efficiency, reduce spending, increase automation and eliminate manual errors. They must ensure that project resourcing is aligned with goals and strategy and establish ways of measuring KPIs at the outset.
- **Stakeholder mapping and engagement** — For successful project resourcing, companies must know their stakeholders. They use methods like Design Thinking to gain comprehensive stakeholder inclusion and employ a holistic ecosystem view of project resourcing.
- **Optimal training** — Team members and partners should have clearly defined goals and receive appropriate training so they can understand how they support the transformation and can conform to an established governance structure that serves the corporate strategy.

Unfortunately, project resourcing is not without limits. To balance the trade-off between costs and budget limitations and achieving transformation goals, CIOs must assess resourcing beyond the transformation. Having a game plan for how resourcing will transition into the company’s steady state after the transformation will help set strategy and expectations early, ensuring success.

## AUTHORS

SAMIR DATT, Managing Director, Technology Strategy and Operations, Houston

MATT DAVIS, Managing Director, Technology Strategy and Operations, Dallas

# About Protiviti

---

Protiviti ([www.protiviti.com](http://www.protiviti.com)) is a global consulting firm that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Protiviti and our independent and locally owned Member Firms provide clients with consulting and managed solutions in finance, technology, operations, data, analytics, governance, risk and internal audit through our network of more than 85 offices in over 25 countries.

Named to the [2021 Fortune 100 Best Companies to Work For](#)<sup>®</sup> list, Protiviti has served more than 60 percent of *Fortune* 1000 and 35 percent of *Fortune* Global 500 companies. The firm also works with smaller, growing companies, including those looking to go public, as well as with government agencies. Protiviti is a wholly owned subsidiary of Robert Half (NYSE: RHI). Founded in 1948, Robert Half is a member of the S&P 500 index.

For more information, please contact us at [TechnologyConsulting@protiviti.com](mailto:TechnologyConsulting@protiviti.com).