IT as a Strategic Business Partner: Implementing Business Relationship Management
Meet the presenters…
Chris Lucas M.Ed., BRMP

- Director in Information Technology Services (ITS)
  - Business Relationship Management
  - Training Services
  - Marketing and Communications
- 13 years in Higher Ed
Amanda Petersen

- BRM for Administration & Finance in WVU IT Services
- 16 years industry experience
  - 14 years in IT Consulting
  - 2 years in Higher Ed. at WVU
AGENDA

• Introductions
• Overview of Business Relationship Management
• WVU and Penn State BRM implementations
• Lessons learned
If so, how long has BRM been in place?

- Just learning about it
- 1-3 years
- 3-5 years
- 5-7 years
- 7+ years
Does your organization have a BRM role or function?

- Yes
- No
- Not Sure
Your BRM Role Experience

If not, do you have plans to implement BRM?
• No plans
• Considering
• Definitely pursuing
What is Business Relationship Management?
BRM Definition

Business Relationship Management stimulates, surfaces, and shapes business demand for a Provider's products and services and ensures that the potential business value from those products and services is captured, optimized, and recognized. – Business Relationship Management Institute
Typical BRM Role

The role can vary widely from organization to organization.
Typical BRM Competencies
BRM Maturity Model

© 2015 Business Relationship Management Institute, Inc. Unless otherwise noted, use is restricted to BRMI members for non-commercial purposes.

LEVEL 1
AD HOC
Loudest-in, first-out

LEVEL 2
ORDER TAKER
Frequent misperceptions build distrust & reactive course-changes

LEVEL 3
SERVICE PROVIDER
The routine is routine; innovation is a challenge

LEVEL 4
TRUSTED ADVISOR
Cooperation based on mutual respect and understanding

LEVEL 5
STRATEGIC PARTNER
Shared goals for maximizing value, shared risks & rewards

My Provider is integral to business success and growth and helps me succeed
My Provider is helpful and reliable
My Provider prevents me from making big mistakes but I'm not always sure of the direction we're heading
I engage my Provider when I need something so they stay out of my way when I don't need them
If I'm lucky enough to get my Provider's attention, the result costs too much, delivers too little, and takes too long
We work together with our business partners to survive and prosper
Embrace Continuous Improvement
Our business partners understand our capabilities, works with them, and helps improve them
Portfolio & Transition MGMT Excellence
Our business partners help set priorities, but we are always behind
BRM & Service MGMT Excellence
We are asked to be predictable but there is no way to forecast demand so we know we disappoint our business partners more often than not
Establish Demand MGMT Discipline
I'm too busy to think about anything other than being too busy

Embrace Business Value Realization
Engage Provider in Strategic Thinking
Embrace BRM Role & Service MGMT
Embrace the Reality of Existing Capabilities
© 2015 Business Relationship Management Institute, Inc. Unless otherwise noted, use is restricted to BRMI members for non-commercial purposes.
BRM is *not*...

<table>
<thead>
<tr>
<th>Service Owner</th>
<th>Business Analyst</th>
<th>Project Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Managing one or more services throughout their entire lifecycle</td>
<td>• Gap analysis</td>
<td>• Project activity planning</td>
</tr>
<tr>
<td>• Accountable for delivery of a specific service</td>
<td>• Requirements gathering</td>
<td>• Resource planning</td>
</tr>
<tr>
<td>• Represent the service across the organization</td>
<td>• Functional design</td>
<td>• Budget management</td>
</tr>
<tr>
<td>• Negotiate SLAs and OLAs</td>
<td>• Test case preparation</td>
<td>• Risk analysis</td>
</tr>
<tr>
<td></td>
<td>• Developer liaison</td>
<td>• Monitoring and reporting progress</td>
</tr>
</tbody>
</table>
BRM Implementations at WVU and Penn State
About West Virginia University

- West Virginia’s flagship land-grant research institution
  - 3 regional campuses in addition to main campus
  - ~32K students (29K+ main campus)
  - ~8K faculty and staff
  - $127 million annually in sponsored contracts and research grants

- Central ITS organization for main campus
  - College & department IT groups (15+)
  - Regional campus IT groups (3)
Drivers for BRM

- 2014 ITS merger – 5 former groups

- CIO and Senior Leadership instituted BRM unit

- Goals:
  - Big picture thinking – proactive vs reactive
  - Normalize interactions with constituencies
  - Transform “customer interactions” into business partnerships
Current State

BRMs assigned to 3 Functional/Business Areas and 2 Strategic Competencies
## Key Successes

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Description</th>
<th>Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Tool</td>
<td>• Admissions Office pursuing purchase of a CRM tool</td>
<td>Connecting Stakeholders</td>
</tr>
<tr>
<td></td>
<td>• BRM brought other interested parties to the table</td>
<td></td>
</tr>
<tr>
<td>Enterprise Health &amp; Safety Management project</td>
<td>• High-dollar software purchased without IT involvement</td>
<td>Institutional Perspective</td>
</tr>
<tr>
<td></td>
<td>• Multiple stakeholder groups</td>
<td></td>
</tr>
<tr>
<td>Procurement Transformation</td>
<td>• Overhaul and modernization of Procurement office services and technology</td>
<td>Strategic Partnership</td>
</tr>
</tbody>
</table>
Future State

• Improve communication and collaboration with Business Analysts and PMO
• Develop approach(es) for regular partner engagement
• Advance business & technology road-mapping efforts
• Continuous examination of demand and services – Are we meeting the needs of the institution?
About Penn State

- Pennsylvania's only land-grant university, Penn State has a broad mission of teaching, research, and public service.
  - Twenty-four campuses
  - 17,000 faculty and staff
  - 100,000 students
- Distributed IT Organization
  - Information Technology Services (ITS)
  - Commonwealth Campuses, Colleges, and Administrative units
Drivers for BRM

• Creation of ITS Services and Solutions (SaS)
• Strengthen relationships
• Increased understanding of business goals
• Increased input from the business into IT decisions
• Surface and shape demand for ITS services
Current State

IT Transformation (ITX) Program
Key Successes

• Socializing the BRM role
• Establishing workflow processes with Service Delivery, Project Management Office, Business Analysts, and Architects
• Establishing initial relationships
• Focusing on business value gains
Future State

• Continue to support Penn State’s adoption of ITSM
• Help establish portfolio management processes and BRM engagement points
• Further define how BRM engages stakeholders within ITS
• Continue to develop new relationships with the business
Lessons Learned

• Organizational clarity of the role
• Collaboration within BRM team
• Managing expectations in alignment with IT organization capabilities
• Support from leadership and all levels of the IT organization
• Relationships aren’t built overnight
• Maturity of relationships will not all be the same
What key takeaway(s) from this presentation might be valuable to bring to your institution? Enter feedback in the chat log!
Help Us Improve and Grow

Thank you for participating in today’s session.

We’re very interested in your feedback. Please take a minute to fill out the session evaluation found within the conference mobile app, or the online agenda.