UNITE & CONQUER: 7 PHASES TO ALIGN IT AND BUSINESS FOR SUCCESS

WorkExcellence
Creating Growth & Performance

We Are Work Excellence

At Work Excellence, we help organizations get-and stay-on the same page, creating more value now. Misalignment between IT and business teams can slow down operations and impact outcomes, but it doesn't have to be that way. This how-to guide will empower your teams to:

- **Achieve Clarity:** Streamline decision-making and improve communication.

- **Align Goals:** Ensure IT and business are working toward shared objectives.

- **Boost Efficiency:** Enhance resource allocation and optimize project timelines.

The end result? **Aligned, efficient,** and **consistent teams** delivering excellence through better Business Intelligence tools.

<u>Unlock Your Team's Potential—Schedule a Call with a Work Excellence Coach</u>

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The Benefits of Team Alignment

Most organizations face challenges when aligning IT and business teams. *Here's why solving this gap is critical to success:*

01 Misaligned Teams = Lost Revenue

02 Cross-Departmental Collaboration Drives Results

03 Clear Communication is Key for a Strong Culture

By focusing on team alignment, your business will:

01 Complete projects faster.

02 Leverage data more effectively.

03 Drive better business decisions.

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How to Bridge the Gap Between IT and the Business

DISCOVERY

REQUIREMENTS GATHERING

PRIORITIZATION/ SCHEDULING

DEVELOPMENT

QA/TEST

DEPLOYMENT/ PRODUCTION

REVIEW/ ADVANCE

How to Bridge the Gap Between IT and the Business

Starting Point: There's a Business Need for Information

▶ **Phase 1. Discovery:** *Gather the Business User Story*

    1.1 Identify Problem Statement
    1.2 Understand Current Process and Tools
    1.3 Identify Expected ROI
    1.4 Identify Business Timeline
    1.5 Build Contingency Plans Based on Needs
    1.6 Data Governance Review with Stakeholders

DISCOVERY

Checkpoint: *Business Case is Understood by All Stakeholders*

Pro Tip: Effective communication is key from the outset. This step focuses on ensuring all stakeholders understand the business need and its importance, establishing a shared purpose. It's not just about identifying the need, but also about creating a plan to handle multiple simultaneous dynamic priorities and needs. Strong collaboration between IT and the business begins here, setting the foundation for smooth operations throughout the process.

How to Bridge the Gap Between IT and the Business

> **Phase 2. Requirements Gathering:** *Build and Validate the Requirements*

    2.1 Develop Requirements and Recommendations
    2.2 Identify Gaps in Requirements Documentation
    2.3 Communicate Gaps to the Business
    2.4 Adjust Requirements
    2.5 Develop Level of Effort Estimate
    2.6 Review Requirements Document

REQUIREMENTS GATHERING

Checkpoint: *Requirements Document Finalized and Agreed Upon*

Pro Tip: Once the business case is clear to everyone, it's time to gather requirements. This is where transparency on both sides is critical—where the data lives, who manages it, and the key aspects of each measurement. Identifying gaps early and working together to solve them can prevent delays later. With both IT and business teams often juggling multiple priorities, it's essential to establish how much effort will be required and ensure all stakeholders are aligned on the current state before moving forward.

How to Bridge the Gap Between IT and the Business

▶ Phase 3. Prioritization/Scheduling: *Prioritize the User Story*

    3.1 Review Backlog Priority List
    3.2 Review Resource Availability
    3.3 IT Identify Available Date
    3.4 Business & IT Discussion on Priorities and Timelines

PRIORITIZATION/ SCHEDULING

Checkpoint: *Agreed Upon Timeline for Work to Begin*

Pro Tip: With the requirements in place, both teams should have clarity on priorities. It's vital to communicate these priorities clearly, particularly when new projects are introduced. IT needs to provide transparency about resource availability, while the business must be clear on the purpose and urgency of each task. Open, honest communication is crucial to set realistic expectations on timelines and available resources. This mutual understanding ensures that both sides can move forward confidently and efficiently.

How to Bridge the Gap Between IT and the Business

▶ **Phase 4. Development:** *Build the Solution*

    4.1 Move User Story to Active
    4.2 Create Tasks
    4.3 Complete Tasks
    4.4 Build Data Definitions and Standard Use Documentation
    4.5 Alert Business on Milestone Completion

DEVELOPMENT

Checkpoint: *Solution is Ready for Testing*

Pro Tip: Once timelines are agreed upon, it's time to build. As work progresses, there is always a risk of siloed communication. To avoid this, teams should maintain regular check-ins, updating each other on completed tasks and any changes to timelines. Keeping an open dialogue ensures that the project remains visible to everyone involved and helps maintain momentum without unnecessary delays.

How to Bridge the Gap Between IT and the Business

▸ **Phase 5. QA/Test:** *Test the Solution*

    5.1 Move User Story to Test

    5.2 Identify Testing Timeline

    5.3 Train Pilot Users

    5.4 Pilot User Use the Model

    5.5 Generate User Feedback

    5.6 Identify Tasks Based on Feedback

    5.7 Complete Tasks

    5.8 Validate Fixes

QA/TEST

Checkpoint: *Solution is Ready for Deployment*

Pro Tip: With development completed, it's time to test. Clear, consistent communication during this phase is crucial to avoid misunderstandings and unnecessary rework. Defining the feedback process—including tools, frequency, and format—will ensure both teams stay aligned, and issues are addressed promptly. This clarity in feedback helps ensure that any necessary adjustments are made efficiently.

How to Bridge the Gap Between IT and the Business

> **Phase 6. Deployment/Production:** *Deploy the Solution*

6.1 Communicate Deployment Timeline
6.2 Deploy Solution to Production
6.3 Train Users
6.4 Implement into Process
6.5 Generate User Feedback
6.6 Identify Tasks Based on Feedback
6.7 Complete Tasks
6.8 Validate Fixes

DEPLOYMENT/ PRODUCTION

Checkpoint: *Solution Meets Requirements*

Pro Tip: As testing wraps up and deployment begins, maintaining the same level of feedback and communication established in previous phases is essential. Sticking to the routine of regular check-ins and feedback will ensure that both teams remain aligned as the solution moves into production. Discipline in this stage prevents small issues from becoming major roadblocks and keeps the solution on track to meet the organization's needs.

How to Bridge the Gap Between IT and the Business

Phase 7. Review/Advance: *Validate the Solution*

7.1 Two Week Business and IT Solution Review
7.2 One Month Business and IT Solution Review
7.3 6 Month Business and IT Solution Review
7.4 Generate User Feedback
7.5 Identify List of Potential Enhancements

REVIEW/ ADVANCE

ENDPOINT: *Current Version Completed; Version Next Work Identified*

Pro Tip: Deployment is not truly the final phase—it's the beginning of ongoing refinement. As the solution moves into production, it's crucial to continue the communication cadence established earlier. Regular touchpoints and feedback ensure that any shifting needs are addressed promptly.

Once deployed, regular reviews (at two weeks, one month, and six months) allow IT and the business to assess the solution's performance and gather feedback for potential improvements. This process ensures that the solution evolves in alignment with business needs, staying flexible and effective as the organization grows. Continuous feedback and collaboration will help you not only maintain the current solution but also prepare for enhancements and the next phase of work.

Work Excellence Work System

DISCOVERY → REQUIREMENTS GATHERING → PRIORITIZATION/ SCHEDULING → DEVELOPMENT → QA/TEST → DEPLOYMENT/ PRODUCTION → REVIEW/ ADVANCE

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Business Request to Deployment Work System

phase purpose	Gather the business user story	phase purpose	Build and validate the requirements	phase purpose	Prioritize the user story	phase purpose	Build the solution	phase purpose	Test the Solution	phase purpose	Deploy the Solution	phase purpose	Validate the Solution	
1.0	Discovery	2.0	Requirements Gathering	3.0	Prioritization / Scheduling	4.0	Development	5.0	QA / Test	6.0	Deployment / Production	7.0	Review / Advance	
1.1	Identify problem statement	2.1	Develop requirements and reccomendations	3.1	Review backlog priority list	4.1	Move user story to active	5.1	Move user story to test	6.1	Deploy solution to production	7.1	Two week business and it solution review	
1.2	Understand current process and tools	2.2	Identify gaps in requirements documentation	3.2	Review resource availability	4.2	Create Tasks	5.2	Identify test timeline	6.2	Identify deployment timeline	7.2	One Month business and it solution Review	
1.3	Request business timeline	2.3	Communicate gaps to the business	3.3	IT Identify available date	4.3	Complete tasks	5.3	Train pilot users	6.3	Train users	7.3	6 Month business and it solution Review	
1.4	Identify expected ROI	2.4	Adjust requirements	3.4	Business - IT discussion on priorities and timelines	4.4	Build data definitions and standard use documentation	5.4	Pilot users use the model	6.4	Implement into procress	7.4	Generate user feedback	
1.5	Build contingency plans based on needs	2.5	Develop Level of Effort Estimate	3.5		4.5	Alert business on milestone completion	5.5	Generate user feedback	6.5	Generate user feedback	7.5	Identify list of potential enhancements	
1.6	Data governance review with stakeholders	2.6	Review requirements document	3.6		4.6		5.6	Identify tasks based on feedback	6.6	Identify tasks based on feedback	7.6		
1.7		2.7		3.7		4.7		5.7	Complete tasks	6.7	Complete tasks	7.7		
1.8		2.8		3.8		4.8		5.8	Validate fixes	6.8	Validate fixes	7.8		
1.9		2.9		3.9		4.9		5.9		6.9		7.9		
1.10		2.10		3.10		4.10		5.10		6.10		7.10		

Phase purpose column notes:
- There is a business need for information
- User story is understood by all stakeholders
- Requirements Document Finalized and Agreed Upon
- Agreed upone timeline for work to being
- User Story is Ready for Testing
- User story is ready for deployment
- Solution meets Requirements
- Current Version completed. Version next work identified.

The Work System pictured above is just one of our 4 core alignment tools that has helped many teams get and stay on the same page.

Ready to Unite Your Team? Let's Get Started!

You now have the blueprint to unite your IT and business teams. **By following the phases outlined in this guide, your organization will:**

> Create a streamlined process for decision-making.

> Achieve true collaboration between departments.

> Improve resource allocation and efficiency, boosting your bottom line.

Let's take your organization's performance to the **next level!**

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