

Consulting In Detail

Team Learning | Fact-Based Planning | Fact-Based Project Management

Overview

Consulting In Detail helps functional and project teams to plan, organize, execute, measure, and achieve high impact results.

Your challenges may include:

- High expectations
- Strategic impact
- Difficult or unusual scope
- Rapidly changing environment
- Undeveloped business case
- Incomplete project plans
- Missing or unfocused metrics
- Implementation roadblocks

Consulting In Detail helps your team to learn workable solutions for the most challenging problems, when routine approaches would be insufficient, and then execute the solutions in real world environments, where underlying conditions change continuously.

Consulting In Detail provides:

- Team Learning
- Process Improvement
- Analytic Reinforcement
- Fact-Based Planning
- Fact-Based Project Management

Working together, we help your team to achieve its targeted results:

- Shared expectations
- Workable plans
- Intelligent adaptation
- Measurable outcomes
- Transparent reporting
- Resource optimization
- Effective execution
- Leadership confidence

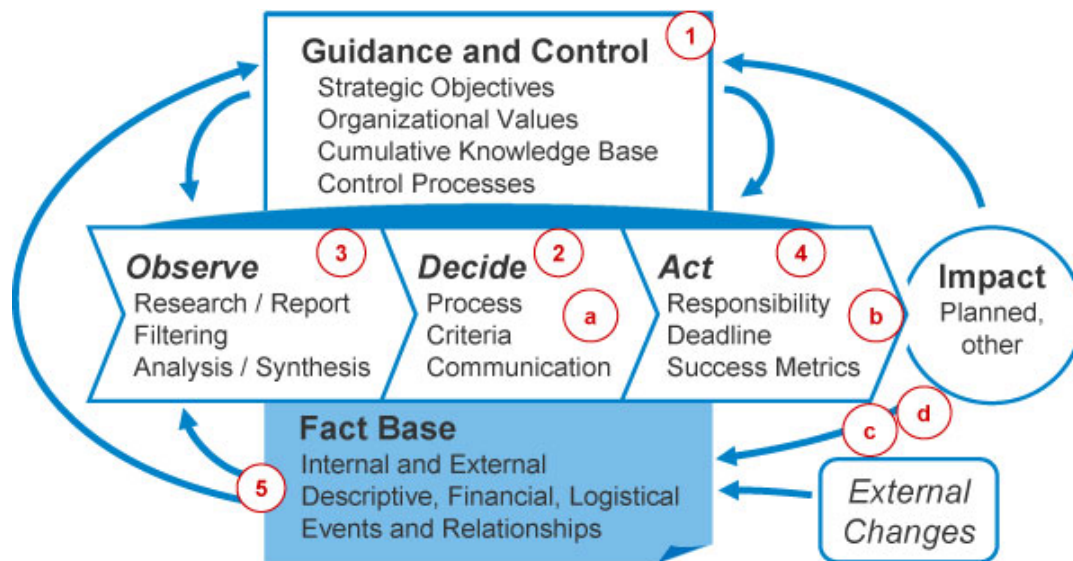
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Team Learning Model

A working team's success depends on its ability to observe information and adapt intelligently as the business context or conditions on the ground diverge from initial expectations.

Common touch points for accelerating team learning are illustrated below.



Planning Leverage Examples

1. Aligning strategic view with practical planning and action.
2. Establishing a team culture of open communication and fact-based decisions.
3. Improving the speed and quality of staff work that can guide crucial decisions.
4. Creating accountability, deadlines, and success metrics for all planned results.
5. Maintaining alignment as background conditions change or issues arise.

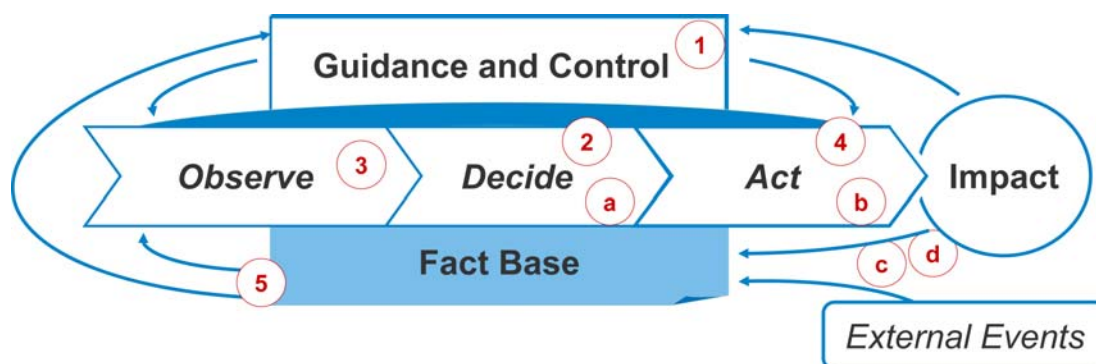
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Implementation Leverage Examples

- A. Validating that plans include all necessary and sufficient actions.
- B. Articulating clearly how business value will be created and measured.
- C. Rigorously tracking status of key completions while avoiding unnecessary detail.
- D. Managing hand-offs between teams with the same care as customer turnovers.



Fact-Based Planning

Fact-based planning means helping your functional or project team to observe, plan, and act with intelligence and clarity.

- Orienting the working level resources to strategic expectations.
- Organizing team exercises to draw actionable conclusions from detailed information.
- Performing key studies in depth, in confidence, and with reliable accuracy.
- Communicating decision alternatives and gaining stakeholder agreement.
- Specifying implementation plans that will achieve the intended outcomes.
- Conclusively tracking results vs. expectations.

We can organize and facilitate work performed by your staff – or provide hands-on analytic assistance.

We have also forensically reconstructed and documented the history of past decisions and actions to draw lessons, resolve conflicts, and support litigation.

Fact-Based Project Management

Successful projects begin with a clear plan to navigate expected terrain. But the map is not the territory. For strategic projects, the business context and conditions on the ground will surely diverge from the original plan.

Fact-Based Project Management is the process of observing, planning, and acting in order to achieve a targeted objective under changing conditions.

- Monitoring key facts – descriptive, financial, and logistical.
- Setting and adjusting tactics, schedules, resources, control points.
- Achieving a continuously updated plan.
- Defining and tracking the operational and financial metrics of success.
- Communicating with stakeholders and implementation teams.

Consulting In Detail can deliver Fact-Based Project Management in two ways:

- Establishing a common process, shared fact base, analytic standard, and communications format to improve team learning and interaction
- Supplementing the analytic bandwidth of project teams or program leaders.

Our work helps the extended project team – from executive sponsors to hands-on resources – to understand the mission, maintain focus, and achieve the objective.

David W. Jones, Principal Consultant

David W. Jones delivers a rare combination of strategic perspective, financial expertise, project management discipline, and team facilitation skills developed over a 25 year career, including 10 years of consulting to major financial institutions.

David recognizes that each business challenge exists within a unique business context and each potential solution must be evaluated in terms of its practical value and implementation feasibility. He understands that rational analysis will not answer all questions but provides a useful reality base on which good judgments can be based. He can help teams to overcome conflicts and find common ground. He understands and balances the often conflicting requirements of clear thinking and fast action.

David has contributed to client success in diverse cases, including:

- Financial Plan For Systems Transformation
- Cost Allocation Improvements
- Post-Disaster Reconstruction and Insurance Claim
- Trading Floor Merger Integration
- Risk Management Reporting
- Telecommunications Procurement

David earned his MBA at Columbia Business School.

Case Study Details

Financial Plan For Systems Transformation

Operations and Finance managers at a leading investment bank conceived a program to replace legacy systems that had been assembled through a series of mergers but not optimized or upgraded. They needed to present a complete financial proposal that included all costs and specific business benefits. There was no standard financial model for project budgeting.

- Structured and produced multi-year financial plan guidelines and templates.
- Articulated and taught methods for measuring achievement of business value.
- Consulted with 24 Finance and Operations development teams to advance their business cases from white board concepts to verifiable financial commitments.
- Consolidated plans and preparing analytic reports for executive presentations.
- Designed and coordinated planning exercises to guide investment prioritization.

Cost Allocation Improvements

The Capital Markets Operations Division of a multinational investment bank allocated costs to front office businesses. Allocated costs were increasing and the basis for allocation was not fully explained. Businesses were losing confidence that costs were under control.

- Reviewed existing cost allocation methods in detail.
- Defined a process and created a template for Finance staff to document and review allocation methods proposed by operations managers.
- Showed through simulation that eliminating small allocations (75% of total items) would simplify reporting and have minimal impact on the amounts allocated.
- Collaborated with software development and technology infrastructure managers to explain the structure of data center cost allocations, the largest source of costs allocated by Operations to the businesses.

- Reviewed the value and limitations of activity based costing and recommended how to structure an exercise focused on the most cost-sensitive business unit.

Post-Disaster Reconstruction and Insurance Claim

A global consumer finance leader suffered heavy damage at its corporate headquarters during the 9/11 disaster. This client retained a design-build firm to assess damage, manage reconstruction, and provide information that was central to the claim for insurance reimbursement, expected to reach \$90 million. But the client had quickly become dissatisfied with the content and quality of logistical and financial status reporting.

- Restructured monthly progress reports, reorganized the records of authorized and actual project spending, and created financial reports that met client's expectations.
- Structured and compiled the property damage insurance claim, including an inventory of damage, explanation of reconstruction strategy, and fully detailed itemization of cost.
- Gathered and framed input from architects, engineers, and construction managers; produced analytic research studies; and prevailed against challenges by insurers.
- Helped the client to achieve over 90% of the targeted recovery, a very high percentage.
- At the client's request, assisted its Technology division to complete an additional insurance claim of similar size that had stalled after 18 months. Developed a project plan, reorganized claim expenses, established reporting database, challenged inadequate input, organized presentation of the finished claim, and defended items contested by insurers.
- Increased the insurer's offer to settle this claim by 65%.
- Also helped the client's Finance staff to refocus, rationalize, and support the claim for business interruption to meet insurers' acceptance criteria. Full claim settlement followed.

Trading Floor Merger Integration

A financial conglomerate had acquired an industry leader in fixed income underwriting and trading. The merger implementation plan included reconstruction of a 1,200 seat trading floor, upgrades to the computing and network infrastructure, and integration of legacy systems from both firms. But this \$50 million project was disorganized and progress had stalled.

- Enabled a replacement project manager to reorganize and complete the merger.
- Organized and integrated the project plan; compiled the budget; tracked progress against the plan; restructured weekly reporting to the senior oversight committee; wrote all reports presented to this committee; led interactions with senior end-users; wrote end-user training materials; and provided end-user support.
- Accomplished the same results for a similar project to add 600 trading positions to complete a merger with a major money center bank. Merged foreign exchange, derivatives, and emerging markets staff and applications into the expanded environment.
- Assisted technology managers of the combined firm to plan and propose an insourcing of network management services that had been outsourced to the bank's legacy vendor.
- Evaluated the existing contract, structured and assembled the conversion plan, wrote proposals to senior management, and integrated detailed implementation schedules. The insourcing was technically successful and achieved a \$60 million savings goal.

Risk Management Reporting

The credit card division of a leading multinational bank had lost confidence in the technology infrastructure division's ability to manage and learn from unplanned service interruptions. The global processing executive wanted an independent evaluation of the Problem Management function's effectiveness.

- Showed how the client's dissatisfaction stemmed from a post-merger reduction of business-facing relationship management resources without a corresponding strengthening of Problem Management resources and methods.

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- Recommended steps for improving the Problem Management function, including restructuring relationships with key stakeholders, clarifying the scope of each systematic report, and improving reporting formats.
- Also documented a high visibility plan to remediate serious risk control gaps (security, change management, and business continuity) in midrange server environments and designed progress reports, all for presentation by Risk Management to Auditors and the Chief Information Officer.
- Also guided a redesign of Risk Management's consolidated global monthly report to executive management.

Telecommunications Procurement

While supporting the Risk Management projects, I was loaned to the senior technology sourcing executive to coordinate two telecommunications projects.

- Managed all stages of an RFP process for international circuit bandwidth, achieving savings of 35% on a \$20 million base.
- Wrote an RFP for broadcast fax services, guided vendor selection and negotiation, and achieved savings of 20% on \$5 million base.

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Getting Started

Let's talk about how your organization or project team can improve decisions, actions, and results.

Contact Us

We want to hear more about your current challenges, so there is never a cost or obligation for our initial discussions.

- Phone: (917) 538-4649
- E-mail: Info@ConsultingInDetail.com
- Mail: Consulting In Detail, 154 West 75 Street #4B, New York, NY 10023

Our Working Relationship

- After our initial consultation, we may propose a targeted scope, schedule, and cost.
- We commit to focus exclusively and energetically on your work until it is complete.
- We do not actively solicit additional work within your organization while we are completing the targeted assignment.
- We do not work for or market to other firms while we perform your work.

Next Steps

- Contact us to discuss how our expertise and hands-on effort can contribute to your success.