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# WCG Suite Benefit Realisation Review

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## 1 Executive Summary

The transversal ICT initiatives, branded as the WCG Suite, commenced in 2013 and have been through business case development, planning, application development, as well as commencement of implementation and institutionalisation.

Given PTM's initial recommendation to establish a Value Management capability, and having reached the conclusion of the initial MTEF allocation period, a Benefits Realisation Review exercise was embarked upon; to provide an implementation status view to key stakeholders, assess the capability gaps and identify a high-level benefits realisation roadmap.

BizProjects implementations should conclude during the 2016/17 financial year, excluding DTPW institutionalisation and enhancements primarily linked to the IDMS business process optimisation. In the DotP instance, Transversal and Departmental, initial integration scope has been achieved. The monitoring of PSG projects are reported at Cabinet, Provincial Top Management (PTM), and at the various PSG Exco meetings. In addition, DHS has leveraged the web scheduler capability for intermediate projects to enable project information to be captured at source resulting in improved monitoring and evaluation.

While the capability has largely been implemented, key impediments related to the solution implementation and institutionalisation exists, which inhibit leveraging the full capability and benefits of BizProjects. Change management capacity is imperative for institutionalisation. DTPW also requires additional capability to be implemented in order to fully realise BizProjects benefits.

BizPerformance solution capability was largely delivered, however it is the solution quality and capacity that impedes benefit realisation. Solution performance and process optimisation will imminently be implemented followed by departmental training and rollout. This will put further pressure on change management capacity.

Thus far, BizBrain is a BI Data warehouse and technology Implementation, with transversal (provincial) and department-specific capabilities. Besides transversal functionality, some of the departmental requirements were also implemented and others are in development, as depicted in the Figure 14 below.

BizBrain has also delivered additional capability and benefits beyond the business case, including a mobile performance information application, Datazen.

The Integrated Business Intelligence capability is partially achieved as it is dependent on the sharing of data across the organisation. Amongst other, data issues including lack of standardisation, quality and data knowledge results in extended rollouts and increased interventions. Infrastructure instability hampers adoption and buy-in. Dependency on change management capability and capacity is a critical success factor as investment in BI advocacy, BI understanding and BI expectation management is required.

For BizBrain benefits to be realised, tightly managed scope and very high organisational commitment will curtail possible runaway costs and timelines. Skills continuity will contain total cost of ownership while data governance will significantly influence benefit realisation timelines.

The implementation of ECM in DSD, DTPW, DOH and DotP, has led to significant gains in consolidation, standardisation, economies of scale and extended footprint of ECM in the WCG. However the review did not specifically focus on these legacy implementations. The review was primarily limited to the Transversal implementation of the MyContent Foundation Pack, including selected additional modules. The adopted implementation model, MyContent Foundation Pack 100 user pilot, has influenced the high departmental demand for ECM capabilities.

As with the rest of the WCG Suite, ECM benefit realisation is very dependent on effective change management. Despite the MyContent team identifying this critical dependency, change management efforts were not sustained.

The solution capacity is a key risk to user adoption. As the solutions were rolled out to departments, system scalability issues compromised system performance. From a functional perspective, solutions achieved initial success based on implementing in mature business environments. Solution usability challenges became evident as the solutions were implemented in less matured business environments.

An ECM Centre of Excellence (CoE) has been achieved; however this is largely constituted from vendor resources. In the case of ECM, skills continuity might not be a critical issue based on the current vendor's competence and service.

Adoption has been inhibited partially because of insufficient early stakeholder collaboration. Early stakeholder collaboration was compromised as a result of expediting project commencement and opting to achieve early traction and implementation. Generic solutions have impeded adoption. Going forward, it might be prudent to cement an explicit standardisation and customisation strategy as this will significantly influence finding the balance between total cost of ownership and fit for purpose departmental solutions.

Furthermore, Change capacity has impeded streamlining business processes and changing the work culture. Change capability and capacity will continue to be a critical success factor to realising ECM benefits.

The WCG Suite is poised to realise anticipated benefits. How WCG approaches the critical success factors and management focus areas will determine the value at which these benefits will be realised. An emphasis on change management has been articulated. This is based on the life cycle status of the solutions. Most of the solutions have been operational for some time. As technical impediments are resolved the focus on technical impediments is likely to dissipate, shifting the focus of benefit realisation dependencies to change management.

Whilst significant WCG Suite milestones have been reached over the last three (3) years, with the foundation for transversal systems being laid and solution capability enabled. There is, however, significant work required, over the next 2-3 years, to further develop, implement, stabilise and institutionalise the WCG Suite, in order to exploit the foundation already built. In an austere environment, with reduced allocations, this becomes challenging.



## 2 Background

The 2013/14 Provincial ICT Delivery plan was developed after consultation with all provincial departments using the provincial ICT planning and MTEC processes. The plan articulates the following:

“Governments in general are working in challenging times where agility and flexibility are key to the successful delivery of services to citizens with an ever decreasing resource pool. WCG is no exception to this trend.”

“In order to address the challenges faced in the ever evolving field of ICTs in the workplace and to maintain the momentum that was gained in the ICT Services Blueprint, Ce-I has embarked on ICT planning processes to develop departmental ICT plans as well as a Provincial ICT plan. Complementary to this process Ce-I and Provincial Treasury facilitated a Mini ICT MTEC on 7 February 2013 where departments were engaged on their ICT plans and budgets for the 2013/14 financial year.”

ICT Mini MTEC engagements were held with all departments on 7 February 2013, where amongst others, departments identified, confirmed and prioritised transversal ICT initiatives. In addition, value for money on ICT spend emerged as a key theme. The departments ranked the top eight (8) provincial ICT initiatives, reflected in Table 1.

Initiative	Ranking (Dept. Averages)
Business Process Optimisation	1
ICT Infrastructure	2
Business Intelligence	3
ECM and Records Management	4
Client Relationship Management	5
Performance Management (Incl. EPM)	6
ICT Organisation	7
IFMS	8

Table 1: Provincial ICT Initiatives

Ce-I provided forecasting of the implementation costs for five (5) provincial ICT priorities across the province over a 5-year period. Some of these figures were based on firm estimates, whilst others needed to be firmed during business case development. The estimates are reflected in Table 2.

	Yr 1 R Millions	Yr 2 R Millions	Yr 3 R Millions	Yr 4 R Millions	Yr 5 R Millions	Total R Millions
Performance Management	24.2	4.5	3.5	2.5	2.5	37.2
Business Intelligence (BI)	36	33	25	16	11.5	121.5
Business Process Optimisation (BPO)	21.6	21.6	12	7.2	7.2	69.6
Enterprise Content Management (ECM)	100.4	103	102	83	58.5	446.9
Customer Relationship Management (CRM)	6.78	9.9	6.5	4.75	4.75	32.68
<b>TOTAL</b>	<b>188.98</b>	<b>172</b>	<b>149</b>	<b>113.45</b>	<b>84.45</b>	<b>707.88</b>

Table 2: WCG Suite Estimated Implementation Costs



Four (4) of the initiatives listed in Table 2 were funded over the 2013/14 – 2015/16 MTEF. The approved funding is reflected in Table 3.

Note: Table 2 and 3 - "Performance Management" includes BizProjects and BizPerformance

	2013/14 R Millions	2014/15 R Millions	2015/16 R Millions	Total R Millions
Performance Management	24.2	4.5	3.5	32.2
Business Intelligence (BI)	20	33	41	94
Business Process Optimisation (BPO)	12	12	30	54
Enterprise Content Management (ECM)	25	50	225	300
Customer Relationship Management (CRM)	-	-	-	-
<b>TOTAL</b>	<b>81.2</b>	<b>99.5</b>	<b>299.5</b>	<b>480.2</b>

Table 3: WCG Suite Approved Funding

The Provincial Top Management (PTM) approved the Provincial ICT Delivery plan in February 2013, which included the following recommendations:

- Ce-I to establish a Value Management capability to track benefits attained through ICT initiatives and ensure that the WCG is able to demonstrate the value attained from its investment in ICT's.
- A funding arrangement for the provision of ICT services is finalized to ensure that there is certainty in respect of Transversal and Departmental baselines to accommodate growth within the Service Delivery environment.

The Provincial ICT Delivery Plan was approved by the Western Cape Government Cabinet in March 2013.

### 3 Introduction

The transversal ICT initiatives commenced with business case development and planning in April 2013. The focus of the transversal ICT initiatives switched to development in 2014/15, as well as commencement of implementation. The focus from 2015/16 onwards has been on further development, implementation and institutionalisation of the transversal ICT initiatives.

To ensure focussed delivery of the transversal ICT initiatives, an interim Transversal Applications (TAPS) structure, at Chief Directorate level in Ce-I was created in February 2014. The first year was spent capacitating the new unit via in-sourcing of skills and setting up the Microsoft platform as a foundation for the BizSystems. The component also took ownership of the OpenText platform used for MyContent / ECM and has taken ownership of the systems developed by Microsoft and other service providers.

Given the intent of the Provincial ICT Delivery plan, that included the recommendation to establish a Value Management capability, and having reached the conclusion of the initial MTEF allocation period, a Benefits Realisation Review exercise was embarked upon to:

- Provide an implementation status view to key stakeholders
- Assess viability of the original business case
- Assess the delivered capability
- Assess the capability gaps against the business requirement
- Identify a high-level benefits realisation roadmap.

This document is positioned to inform key stakeholders and serve as a record of the WCG Suite Benefits Realisation Review. Furthermore it will inform the formalisation of an approach to improve benefits and value management of WCG investments in ICT-enabled business change.

## 4 Review Approach

A qualitative review of the WCG Suite benefits realisation was undertaken based on the purpose, timeframe and available business case information. The review focussed on understanding Business Project Managers' experiences, perspectives and perceptions, and identifying themes and patterns relating to WCG Suite benefits realisation only. A qualitative discussion approach was undertaken to enable free flowing sharing of information leading to attaining insight to contributor views and bias.

To mitigate possible bias, typical enterprise level projects' success and failure contributors were used to validate the views expressed, for example:

- the variation in business ownership
- the investment in change management
- the transition from a project state to operation state

The benefits review approach has largely been informed by an approach devised by the UK Government which has been encoded in a globally practiced methodology stack. One of the primary drivers for establishing this methodology stack was to achieve consistency in project, programme and portfolio management (P3M) practice leading to orchestrated predictability. For the purposes of this review, the methodology was customised to fit the retrospective application thereof. The benefits realisation management framework typically starts from the point an initiative's concept is proposed for first step investment consideration. As a benefit realisation management framework was not initially utilised for the WCG Suite, the review retrospectively applied aspects of the framework.

### 4.1 Review Tools and Techniques

Review tools and techniques utilised were sourced from UK Governments Benefit Realisation Management approach which forms part of their "Managing Successful Programmes" and "Management of Portfolios" methodologies. The elements of a "Benefits Dependency Map" are illustrated in Figure 1.



Figure 1: Benefits Dependency Map Elements

Heat maps have been popularised in IT by the architectural community who utilise heat maps to represent technical architecture complexity to C-level audiences and other key non-technical decision makers. Figure 2 illustrates the "Solution Capability" heat map defined for the purposes of this review.

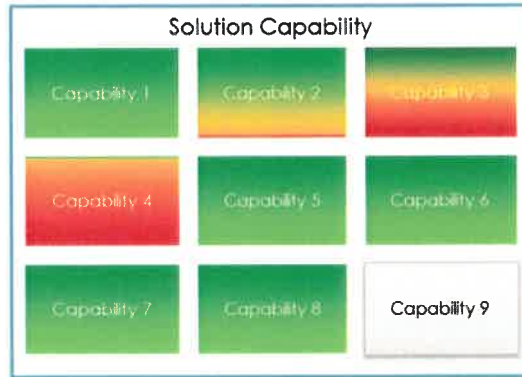


Figure 2: Solution Capability Heat Map

The review utilised an ISO/IEC review scale illustrated in Table 4, Source ISO/IEC 15504-2-2003, [WWW.ISO.ORG](http://WWW.ISO.ORG).

<b>Not Achieved</b>	0 to 15% achievement
<b>Partially Achieved</b>	>15% to 50% achievement
<b>Largely Achieved</b>	>50% to 85% achievement
<b>Fully Achieved</b>	>85% to 100% achievement

Table 4: ISO/IEC Review Scale

The heat map components were informed by the theories and practices relating to projects, change, benefits realisation, and value and project portfolio management.

To validate interpretations of the information presented, the Standish Group's project success factors were utilised for the emerging patterns and themes. In 2015, Standish included a measure of customer perceived value. If viewed in context of this review the latter confirms the value in understanding the customer's view, even if it is perception based. Furthermore, referring to Annexure 1, key project success factors are largely predicated on non-technical facets of a project. Understanding these factors in context of the project assists in validating the information provided, resulting in deductions and summations.

The review was completed in the context of transversal enterprise level solutions. The implication is that the organisation's experience with transversal, enterprise level solutions has been front of mind as well as the general nature of the beast, i.e. the complexity and risks associated with embarking on enterprise level solutions; more specifically Business Intelligence (BI) and Enterprise Portfolio Management (EPM) solutions.

## 4.2 Review Approach

The benefits dependency map was lifted from each business case and used as the key input to review workshops. The benefits, business change dependencies and solution enablers were confirmed in the initial review workshops with key stakeholders. Each element of the business dependency map was assessed by workshop attendees to establish the degree to which each solution enabler, change management intervention and benefit was achieved. The degree of achievement was based on the review scale illustrated in Table 4.

From a **solution capability** perspective, the following was elicited from the workshop attendees:

- completeness of the benefits map
- where appropriate, consensus on the definition of the elements
- whether solution capability was configured, customised and available/implemented
- to what degree was the expected element scope delivered

The confirmed capabilities were assessed qualitatively to establish the degree of achievement. Stakeholders were given the opportunity to achieve consensus, prior to agreeing on a final assessment range. The assessment was mapped in a heat map. Heat map components are defined in Table 5. The first draft heat map was reviewed and amended in subsequent review sessions with the Business Project Manager and other key individuals. The final heat map represents the Business Project Manager's view.

Heat Map Component	Description
<b>Solution Capability</b>	Technical solution capabilities which the system needs to deliver
<b>Change Management</b>	Change management interventions required to realise benefits
<b>Benefits Realisation</b>	Benefits expected to be realised
<b>Value Management</b>	Relevant investment value influencing dimensions

Table 5: Heat Map Definitions

The **Value Management** heat map initially focussed on the overall project. To assist stakeholders in visualising the overall state of the project in a single view, the value management heat map was altered to give greater focus to the solution.

Value Dimension	Description
<b>Solution In Scope</b>	Degree to which initial application functional scope was implemented
<b>Solution On Time</b>	Degree to which the application was implement on time
<b>Project In Budget</b>	Degree to which the project came in budget
<b>Solution Quality</b>	Degree to which the technology (application & infrastructure) is stable, reliable, performs,
<b>Solution Capacity</b>	Degree to which the infrastructure capacity is available to the solution
<b>Solution Serviceability</b>	Degree to which Service Operations and Service Transition process are matured and experienced
<b>Risk Mitigation</b>	Degree to which the benefit realisation risks are being mitigated
<b>Benefits Realisation Management</b>	Degree to which benefit realisation is actively managed to ensure benefits and value is going to be realised

Table 6: Value Dimensions

Value is differentiated from benefit in that benefit represents the degree to which the anticipated outcomes were achieved while value represents how this outcome was achieved. Value management is primarily influenced by finances and risks. There are many definitions of value but essentially what is meant is value for money, i.e. the goods, services or products received are worth the time, cost and effort expended in obtaining them. Value can be seen as the ratio of the satisfaction of needs/benefits and the use of resources (money, people, time, energy and materials) which will normally boil down to cost. Value is retained throughout the project lifecycle using risk

management to stop value erosion through unmanaged threats. Benefits must be delivered to achieve value. For the purpose of this review and to address stakeholder needs to illustrate the impact of the solution quality and serviceability on value realisation the following value dimensions has been mapped in Table 6.

The report has been authored assuming the audience is familiar with the WCG Suite initiative business cases and the WCG environment in general.



## 5 Benefits Realisation Review

The individual solutions within the WCG Suite were reviewed separately. Benefits realisation reviews for the following solutions are articulated below:

- BizProjects
- BizPerformance
- BizBrain
- MyContent

Each solution review contextualises the delivered capability and associated timeline, departmental rollout status and usage, and financial spend. Where appropriate typical benefit realisation challenges associated with the solution are elucidated. In addition, achievement highlights and key benefit impediments are accentuated. The benefits maps have been lifted from the business cases and largely represent the solution capabilities, change dependencies and benefits as articulated in the business case. Benefit heat maps illustrate the degree of achievement for these solution capabilities, change dependencies and benefits. Value dimensions are also illustrated in the Benefit heat maps.

An emphasis on change management has been articulated. This is based on the life cycle status of the solutions. Most of the solutions have been operational for some time. As technical impediments are resolved the focus on technical impediments is likely to dissipate shifting the focus of benefit realisation dependencies to change management.

### 5.1 BizProjects

WCG implemented three independent instances of BizProjects with integrated reporting. Each instance has been configured and customised to specific functional requirements. The following instances have been implemented:

- Department of Human Settlements (DHS)
- Department of Transport & Public Works (DTPW)
- Department of the Premier (DotP) (Transversal-Strategic, Department-Specific, Ce-I)

The DotP instances were implemented in Q4 2013/14 followed by a DotP enhancement release for the Provincial Strategic Goals (PSGs) during Q2 2015/16. The DTPW Release 1 and DHS were implemented in Q4 2015/16. DTPW Release 2 is in progress.

Thus far, for PSG, there are over 150 registered users. This includes the PSG Convenor, Work Group Convenor, Programme Owner, Project Managers, Departmental Project Officers and PSG Secretariats. For Department-Specific there are over 200 users. This includes Programme Owners and Project Managers. DTPW currently has 185 registered users consisting of Senior Managers, Programme Managers, Project leaders, Administrative staff and Project office staff. Over the last two and a half months, 122 of these users have logged onto the DTPW instance.

BizProjects implementations, excluding possible DTPW enhancements primarily linked to the IDMS business process optimisation, should be completed during the 2016/17 financial year. A high level BizProjects timeline is illustrated in Figure 3.

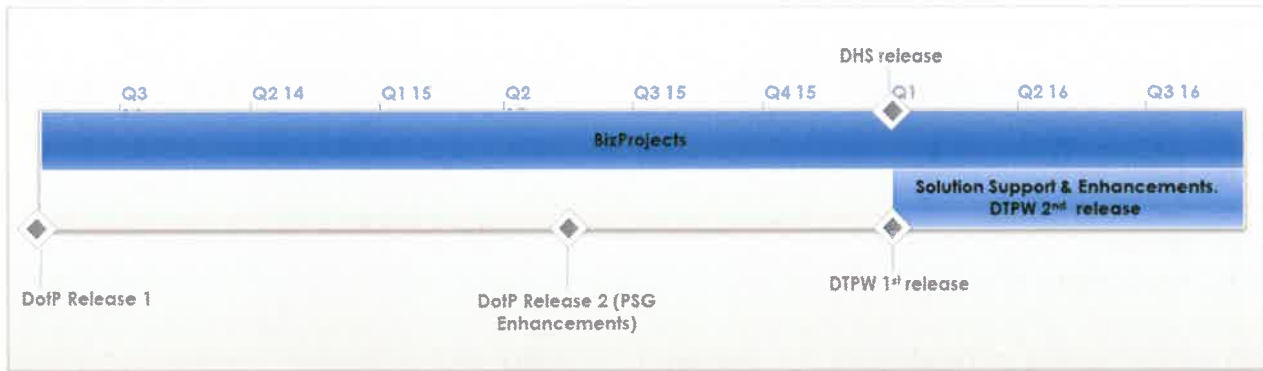


Figure 3: BizProjects High Level Timeline

Figure 4 provides a summary of the BizProjects implementation status, including a highlighted benefit for the Transversal Strategic, DHS and DTPW implementations.

Department	Initial Scope
DCAS	Implemented
DEA&DP	Implemented
DEDAT	Implemented
DHS	Implemented
DLG	Implemented
DoA	Implemented
DOCS	Implemented
DoH	Implemented
DoIP	Implemented
DSD	implemented
DTPW	In Progress
PT	implemented
WCED	Implemented

**All Instances**

- Portfolio, programme & project management capabilities enabled
- Primarily utilised the solution's project management capabilities;
- Largely focussed on governance (conformance) and reporting; and
- Delivered initial scoped reports, dashboards.
- Delivered PSG project monitoring capability

**Transversal Strategic**

- Datazen successfully leveraged to enable project information on mobile platform

**DHS**

- Leveraged the web scheduler capability for intermediate projects

**DTPW**

- Monthly IPPR & MPPR meetings at WCGH use BizProjects reports
- Health Infrastructure cost management & payments captured & audited in BizProjects
- Education Infrastructure cash flow reporting utilizes BizProjects

Figure 4: BizProjects Implementation Status

### 5.1.1 BizProjects Financial Summary

BizProjects budget versus actual spend is represented in Table 7. BizProjects capability should be fully implemented by the end of 2016/17. As from 2017/18, the allocated budget covers the operational support cost only. Funding for enhancements like retrofitting to the IDMS process post Business Process Optimisation, is expected to be sourced from departmental budgets.

(R'000)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
<b>Allocated Budget</b>	8,440	10,320	10,375	6,277	2,709	2,817	40,938
<b>Actual Spend</b>	8,440	10,320	9,590	2,878			31,228

Table 7: BizProjects Budget versus Spend

### 5.1.2 BizProjects Review Synopsis

The BizProjects Benefit Realisation Review is based on the understanding that EPM solutions are challenging to institutionalise and require pre-requisite level of Project, Programme and Portfolio management (P3M) skills. BizProjects is underpinned by a Microsoft packaged project portfolio management solution which typically requires significant change management investment. EPM solutions involve changing ways of working which is often under-estimated and over-simplified. Implementing an EPM solution and training users is only the first step. The rest of the journey is driving the adoption of a consistent and sustainable way of planning, managing and executing projects enabling realisation of the ultimate benefit of project portfolio management.



Figure 5: BizProjects Benefits Realisation Map

The simplified benefits realisation map in Figure 5 illustrates this significant change management dependency. EPM adoption is influenced not only by EPM skills but more so by an organisation's portfolio, programme and project management skill set. Realising the benefits of an EPM implementation is significantly dependent on the organisation's P3M skillset. EPM solutions demand rigorous best practice P3M processes and techniques application.

P3M and EPM skills are currently a South African resource pool challenge which cannot simply be resolved by an individual organisation. To mitigate the challenges represented by diverse skills and levels of expertise in the national resource pool, organisations need to improve their ability to recruit and develop P3M resources. Underdeveloped P3M skills contribute to slow adoption of EPM solutions. Therefore the change management effort is not just to develop EPM skills but also develop and recruit P3M skills. EPM investments can produce organisational benefit and value if it is approached appropriately.

Project Portfolio management is a relatively young developing competence in South Africa. Organisations therefore have to embrace the development of this capability and the implications of its growth cycle. Project Portfolio Management skills within the organisation will directly influence leveraging the high-value benefits of an EPM solution. It might be useful to assess portfolio management skill within WCG to enable improved exploitation of BizProjects' portfolio management capabilities.

From a competence perspective WCG has invested in a P3M methodology which has recently been updated. Within the DotP environment, significant effort has been spent institutionalising this method with limited resources. While the method has been acknowledged within the broader WCG, institutionalisation has lagged for various reasons including resource capacity and or skills.

Benefits Realisation has been assessed independently for each BizProjects instance. The following heat maps are depicted below:

- BizProjects (Transversal Strategic)
- BizProjects (Departmental Specific)
- BizProjects (DHS)
- BizProjects (DTPW)

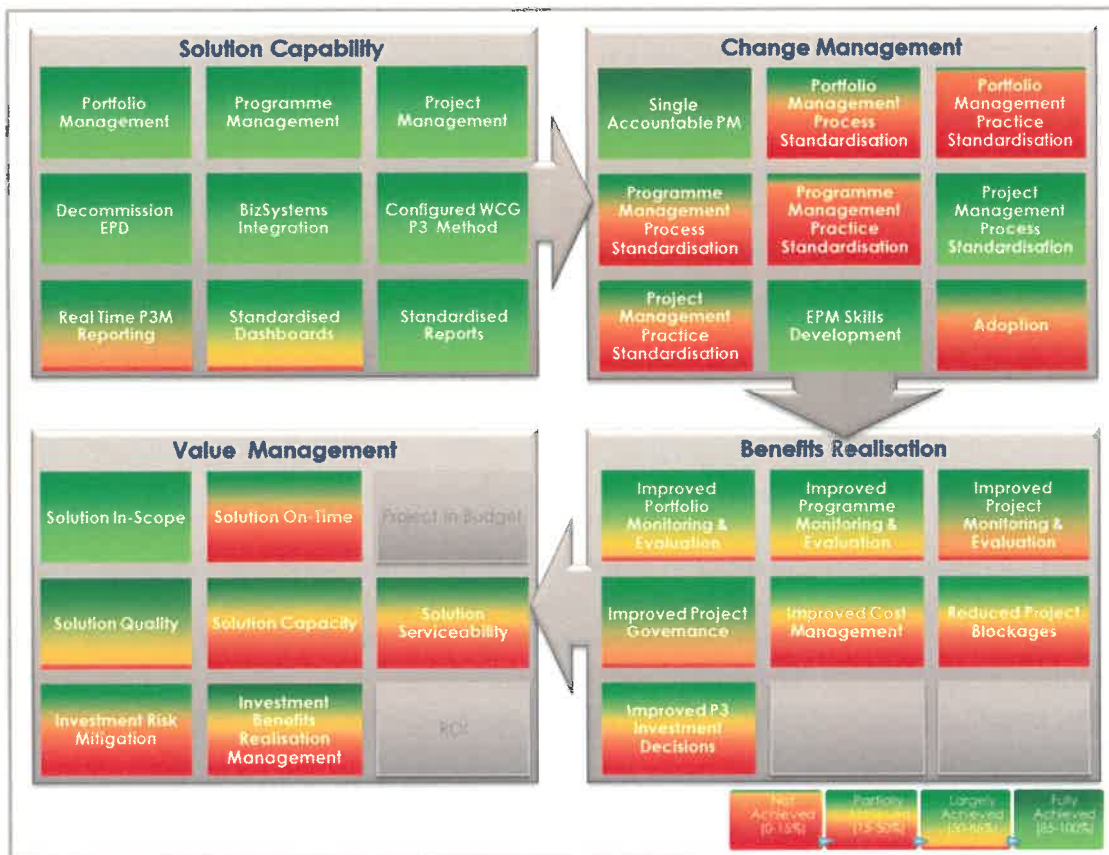


Figure 6: BizProjects (Transversal Strategic) Benefits Realisation Management Heat Map



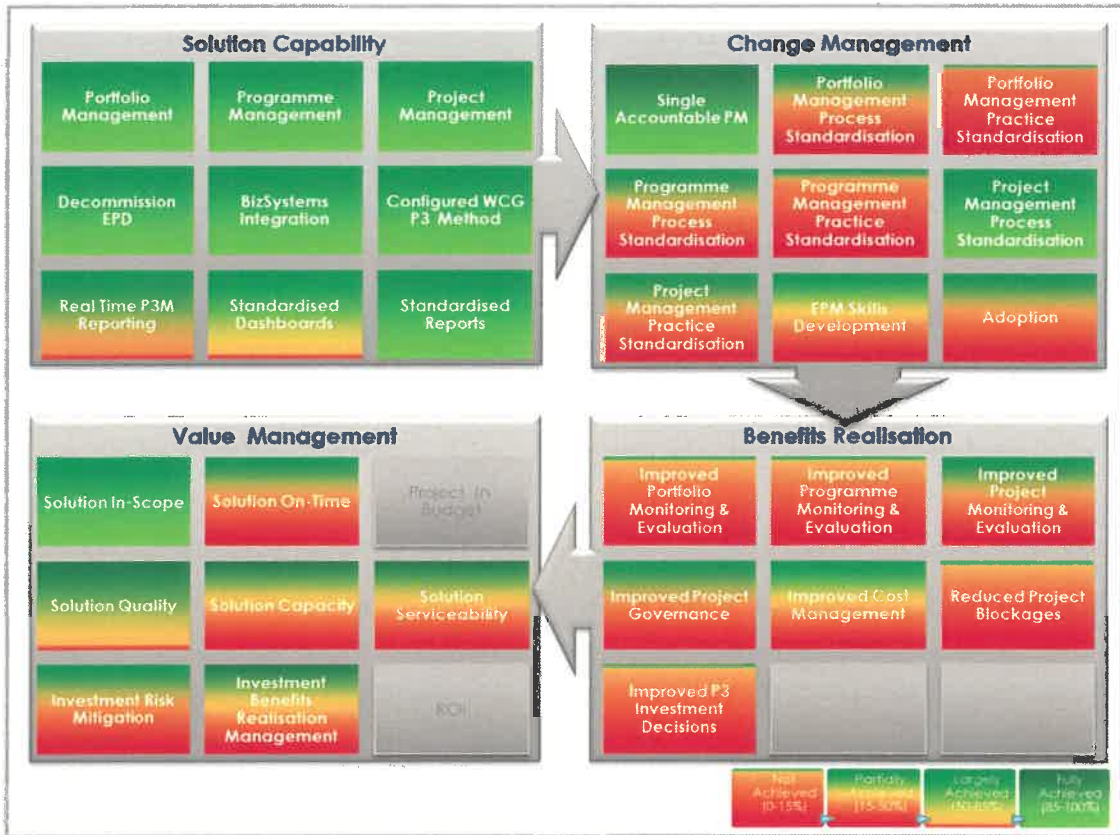


Figure 7: BizProjects (Departmental Specific) Benefits Realisation Management Heat Map

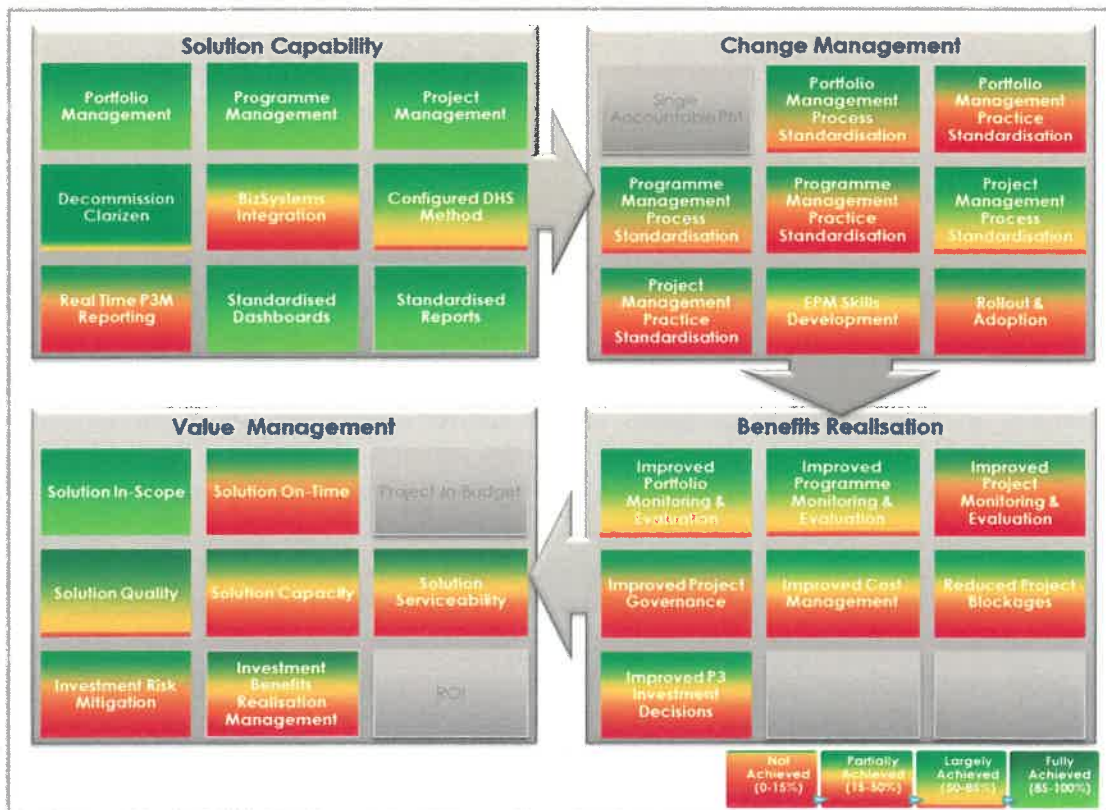


Figure 8: BizProjects (DHS) Benefits Realisation Management Heat Map

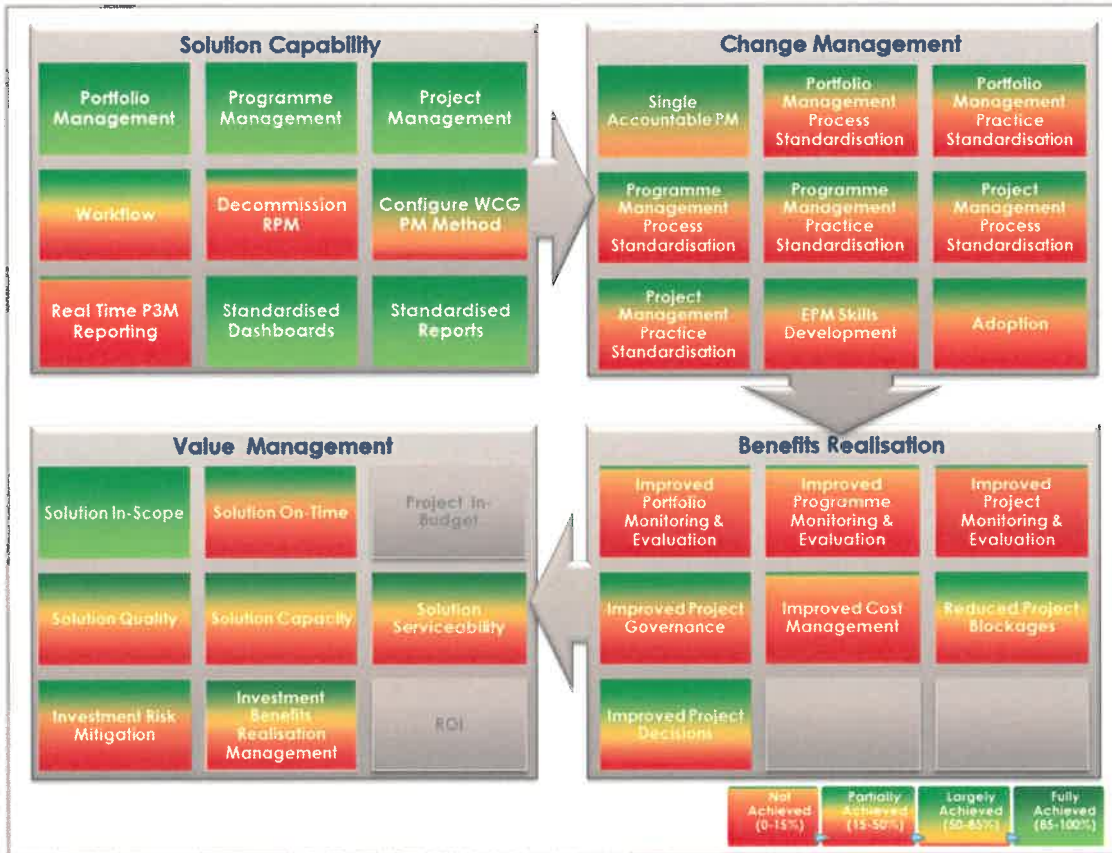


Figure 9: BizProjects (DTPW) Benefits Realisation Management Heat Map

The BizProjects Benefits Realisation Management Heat Map is illustrated in Figure 6 to 9. From a solution capability perspective the three BizProjects instances have:

- been enabled for portfolio, programme & project management;
- primarily utilised the solution's project management capabilities;
- largely focussed on governance (conformance) and reporting; and
- delivered initial scoped reports and dashboards.

In the DotP instance, **Transversal and Departmental**, initial integration scope has been achieved. Datazen has been successfully leveraged to enable project information to be available on the mobile platform. The tool's alert capabilities will be further leveraged which should contribute to realising the benefit of reducing project blockages. The monitoring of PSG projects are reported at Cabinet, Provincial Top Management (PTM), and at the various PSG Exco meetings.

**DHS** has leveraged the web scheduler capability for intermediate projects to enable project information to be captured at source resulting in improved monitoring and evaluation.

Capturing projects spatially emerged to be more complex than initially envisaged. This has led to manually capturing spatial information to enable realising the benefits. However, there is a risk that information might be incorrectly captured. Risk mitigation options include drop-down lists, geocoding, and or quality assurance.

Portfolio views are largely created through extracting project information and not necessarily utilising the tool's portfolio management capability. Thus far, the focus has been on institutionalising



programme and project management. Furthermore, exploiting the tool's portfolio management capability is dependent on defining agreed portfolio management ways of working.

While the capability has largely been implemented key impediments exist which inhibit leveraging the full capability and benefits of BizProjects. Current key impediments include:

- Reporting unreliability of some reports
- Solution instability, specifically as a result of infrastructure capacity
- Solution serviceability (service transition and operations processes)
- Change management capability and capacity

Resolution of these impediments is critical to adoption, as typically resistance to EPM solutions stem from P3M skills, solution quality and usability. To improve benefits realisation, resolving the prevailing solution reliability and stability issues should remain a priority focus. Furthermore, service operations and transition processes should continue to be matured. Incident management, change control and communication processes should remain a priority. From an IT service perspective, service level improvement and sustainability correlates to skills continuity. Ensuring the skills continuity plan sufficiently mitigates this risk would be prudent.

Remediating solution impediments will enable improved benefits realisation. However, change management will remain a critical success factor to realise benefits. It is therefore imperative that the change management capability and capacity challenges are resolved. Furthermore, it is important to note that the cautious approach to resolving these change management challenges is the appropriate approach. Change Management is a relatively young competence and leveraging its value is no easy feat. Like any maturing capability, it is challenged by the skills pool, diverse practices and elusive benefits realisation, therefore a measured approach is advisable.

From a functional perspective, DTPW requires the following improvements to the base capability in order to realise BizProjects benefits:

- Real-time reporting within required timeframes
- Workflow (IDMS)
- Asset management solution integration
- Single view for project expenditure
- Load handling.

Should the solution quality and capacity, the change management and the additional features listed above be timeously addressed, the anticipated BizProjects benefits should be realised.

## 5.2 BizPerformance

BizPerformance was initially released at the end of the 2013/14 financial year. The solution was piloted in four departments during the 2014/15 FY. DoH enhancements were released at the end of 2014/15 followed by a BizProjects integration release. At the end of 2015/16 another enhancement release was deployed and reports were implemented during 2016/17.

The pilot highlighted solution performance issues as well as business processing impacts. To alleviate the impact on departments, the solution was centralised for capturing to the Strategic Management Information (SMI) unit in DotP. The 2016/17 solution optimisation focus should remedy the issues. This will enable Departmental rollout prior to the 2017/18 financial year. BizPerformance timeline is illustrated in Figure 10.



Figure 10: BizPerformance High Level Timeline

### 5.2.1 BizPerformance Financial Summary

The BizPerformance budget versus actual spend is represented in Table 8. BizPerformance capability should be fully implemented during 2016/17. As from 2017/18 the budget base cost is for the provision of minor enhancements and operational support.

(R'000)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
<b>Allocated Budget</b>	3,000	3,600	0,990	1,032	1,084	1,127	10,833
<b>Actual Spend</b>	1,988	3,582	0,990	0,350			6,910

Table 8: BizPerformance Budget versus Spend

### 5.2.2 BizPerformance Review Synopsis

The BizPerformance Benefit Realisation Review is based on the understanding that non-core solutions are typically difficult to harness adoption. Any change management endeavour for such solutions would be very dependent on the solution qualities. A quality solution will significantly assist with mitigating the traditional resistance to such performance management solutions.

The benefits map illustrated in Figure 11 has been extracted from the BizPerformance business case. Despite the noticeable absence of change management, benefits realisation of a new performance management system is traditionally very dependent on effective change management.

While change management is crucial to realising the benefits of BizPerformance, the simplicity of the solution, in comparison with the rest of the WCG Suite, shifts the benefit realisation emphasis to the functionality, usability and performance of the solution. Change management may be impeded relative to the degree to which these solution qualities are compromised.



Figure 11: BizPerformance Benefits Realisation Map

The BizPerformance Benefits Realisation Management Heat Map is illustrated in Figure 12. While the solution capability was largely delivered, it is the solution quality and capacity that impedes benefit realisation. Solution performance and process optimisation will imminently be implemented followed by departmental training and rollout. This will put further pressure on change management capacity. There is also a dependency on departmental staff availability to timeously roll out for 2017/18.

Once the solution's impediments are resolved, the pressure will shift to change management. This will include user training. The second attempt to roll out the solution to departments might experience a degree of resistance due to the reversal of the initial rollout. The solution impediments need to be fully addressed to mitigate this. Sufficient testing should be conducted and the rollout should not be rushed.

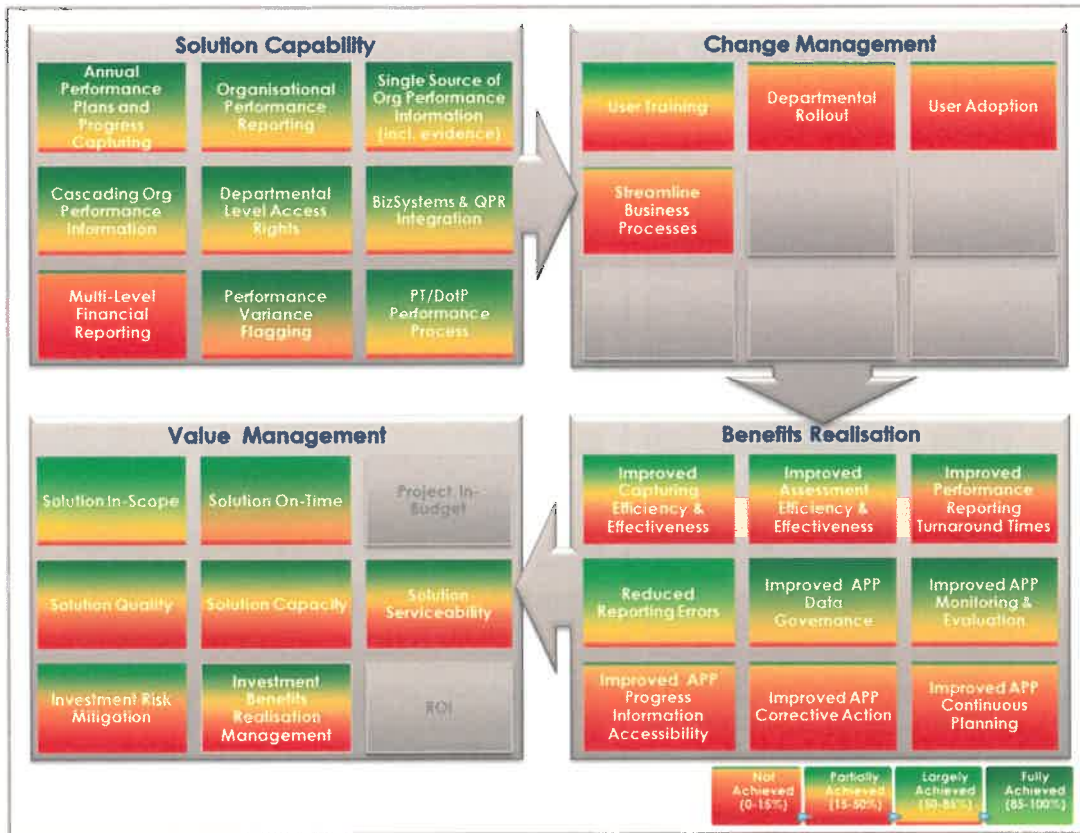


Figure 12: BizPerformance Benefits Realisation Management Heat Map

### 5.3 BizBrain

BizBrain was first released at the end of Q3 2013/14. This release was geared towards Provincial Institutional Performance and was followed by a Provincial enhancement release during 2014/15, as well as a Provincial HR & Finance release at the end of 2014/15. The first Departmental release, which included the Department of Community Safety (DoCS), Department of Environmental Affairs & Development Planning (DEA&DP) and Department of Human Settlements (DHS), was deployed with the Provincial HR & Finance release. Mobile Dashboard capability, initially not in-scope, was released in Q2 2016/17. Currently, a number of releases are underway, including:

- Provincial
  - Outcome Indicators
  - Institution Monitoring and Evaluation
  - Performance Management, HR, Finance, Projects, APP
  - Spatial Data Observatory
- Departmental: Western Cape Education Department (WCED), Department of Economic Development & Tourism (DEDAT), Department of Transport & Public Works (DTPW), Department of Social Development (DSD), Provincial treasury (PT).

The BizBrain timeline is illustrated in Figure 13. Figure 14 provides a summary of BizBrain's current implementation status.

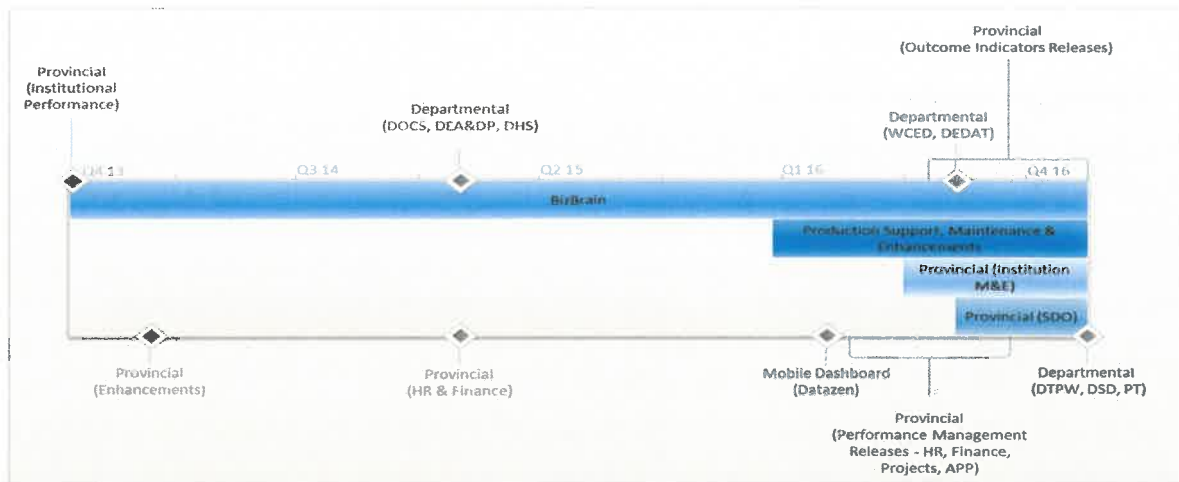


Figure 13: BizBrain High Level Timeline



Department	Initial Scope
DoH	Clinical & Finance
DHS	Housing Demand
DEDAT	IHS, StatsSA
WCED	Institutions / Schools Stats, Enrolment Information
DOCS	Policing, Neighbourhood Watch, Community Police Forum, SAPS, Breach Data, Access Card
DEA&DP	Pollution & Waste
DSD	In Progress
DTPW	In Progress
PT	In Progress
DLG	On Hold (Department)
DoA	On Hold (Ce-I)
DCAS	Not Scheduled
DofP	Not Scheduled

**Initial Scope:**

- BI Data warehouse and Technology Implementation

**Provincial Implementation:**

- Performance Information (People Management, Finance, Projects, APP)
- Institutional Performance (MPAT, FSDM, FOSAD, Evaluations)
- Outcome Indicators
- Spatial Data Observatory
- Monitoring & Evaluation Outcome Based Evidence

**Additional Capability:**

- Datazen (mobile performance info app)
- Amalgamation of multiple DOH BI initiatives – enabled linking financial to clinical info
- Cost efficiencies achieved with single procurement of Stats SA and SAPS data.

Figure 14: BizBrain Implementation Status

### 5.3.1 BizBrain Financial Summary

BizBrain is currently planned to achieve between 60% and 70% of the Departmental implementations, based on the initial limited scope. As from 2017/18, the BizBrain budget assumes a support capability, with limited transversal and no departmental implementation. Additional budget needs to be allocated for 2017/18 to complete the balance of the Departmental base implementations. Furthermore, as BI matures within WCG, increased demand to enhance BI is likely. From WCG enterprise perspective, developing additional transversal capability should be considered. The BizBrain budget versus actual spend is represented in Table 9.

(R'000)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
<b>Allocated Budget</b>	5,000	33,700	40,600	29,840	9,960	10,690	129,790
<b>Actual Spend</b>	4,977	31,344	39,700	11,534			87,555

Table 9: BizBrain Budget versus Spend

### 5.3.2 BizBrain Review Synopsis

The BizBrain Benefit Realisation Review is based on the understanding that Enterprise level BI implementations are more than static extraction tools producing reports. Rather, it is implementing a dynamic tool used to access, consolidate and transform organisational data into meaningful, detailed and digestible information that is used for strategic decision-making and to optimise all areas of an organisation's business. Furthermore, Enterprise level BI implementations is more than implementing a technical solution, it is equally about change management.



Enterprise capabilities require significant change management investment. For BI, the investment is required to enable departments to understand the BI value proposition and shape their specific BI requirements prior to commencing the BI systems development life cycle (SDLC). Thereafter, to institutionalise the BI capability once it has been developed.

BI success is dependent on explicit business rules, or at least institutional knowledge and consensus thereof, and accurate, reliable, consistent, validated data sources. Before a solution can be implemented, an organisation needs to be enabled, through change management, to ensure these fundamentals are adequately in place.

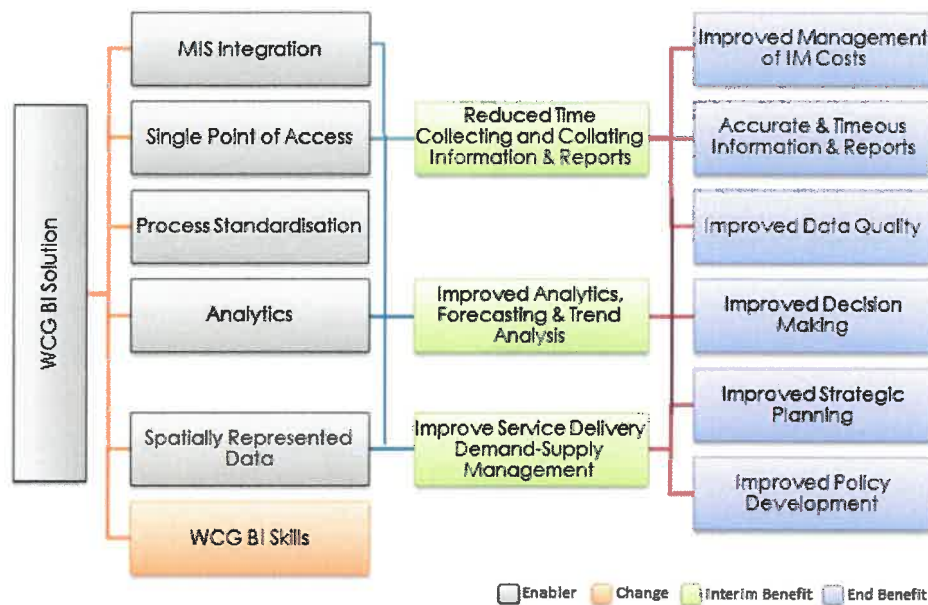


Figure 15: BizBrain Benefits Realisation Map

With reference to the BizBrain Benefits Realisation Map, Figure 15, extracted from the business case, there is a noticeable absence of change management dependencies. It therefore seems that there was limited awareness and, therefore, insufficient addressing of the fundamentals. Organisation readiness to take on enterprise level BI is non-negotiable. The project and the project team had to mitigate this gap by spending time creating awareness around BI and its benefits; and also assist with surfacing/gathering requirements. One of the challenges experienced with departmental knowledge is the allocation of resources that have knowledge of their own niche area requirements but not the required holistic departmental requirements view.

While a data take-on process is constantly maturing, the absence of source systems as systems of records in departments is a significant benefits realisation impediment. Where spread-sheets are the source of data, the ETL process fails due to data inconsistencies and changes. PDFs and MS Word documents are also sources of data. A system of record or Source System of Record is an information storage system that is the authoritative data source for a given data element or piece of information. Furthermore, there is a lack of institutionalised data governance processes and standards. A Data Governance project has commenced to address these issues, amongst others.

BI includes a broad set of data analysis capabilities, including ad hoc analysis and querying, enterprise reporting, online analytical processing, etc. It can also incorporate forms of advanced

analytics, such as data mining, predictive analytics, text mining, statistical analysis and big data analytics. The business case did not explicitly articulate the scope of analytics. In assessing whether or not the data analytics capabilities were delivered, different views surfaced as to what the intended scope was. The heat map is based on the understanding that advance analytics was not included in the initial scope. The delivered analytic capability was based on the prevailing environment maturity at the time.

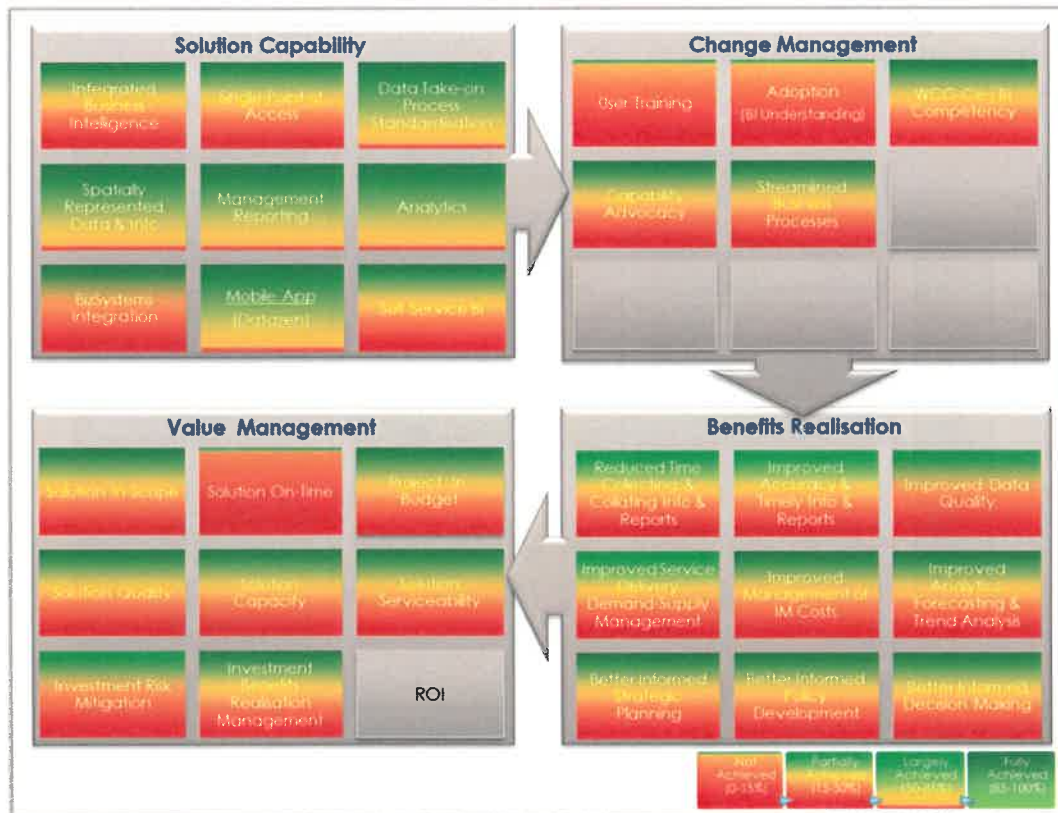


Figure 16: BizBrain Benefits Realisation Management Heat Map

The criticality of change management is reinforced by the heat map illustrated in Figure 16. The Integrated Business Intelligence capability is partially achieved as it is dependent on the sharing of data across the organisation. Current concern around sharing confidential data across departments is a significant impediment to realising the value of enterprise level BI for WCG. Furthermore, this inhibits achieving single point of access and associated benefits.

Thus far, BizBrain is a BI Data warehouse and Technology Implementation. Provincial implementations include:

- Performance information (People Management, Finance, Projects, APP);
- Institutional Performance (MPAT, FSDM, FOSAD, Evaluations);
- Outcome Indicators;
- Spatial Data Observatory; and
- Monitoring & Evaluation Outcome Based Evidence

BizBrain has also delivered additional capability and benefits beyond the business case. A mobile performance information application, Datazen, has been successfully rolled out. The proactive merger of multiple DoH BI initiatives amalgamated into one resulted in the ability to link financial and

clinical information, in addition to the cost savings resulting from the merger. Cost efficiencies have also been achieved with single procurement of Stats SA and SAPS data.

Indirect benefits should be achieved through highlighting the need for a data governance initiative, which is intended to drive departmental system data sanitisation and data quality. Furthermore, business rules were surfaced and standardised and source system disparities were highlighted.

Continuously improving ways of working developed and matured by the project team will continue to positively impact on rollout costs and timelines. This is possibly also a challenge as the project momentum is very dependent on skills continuity. Another project momentum key dependency is departmental readiness.

Data quality issues, specifically data format inconsistencies and instability are key challenges resulting in extended rollouts and increased interventions. Infrastructure instability hampers adoption and buy-in. Dependency on change management capability and capacity is a critical success factor as investment in BI advocacy, BI understanding and BI expectation management is required.

For benefits to be realised, tightly managed scope and very high organisational commitment will curtail possible runaway costs and timelines. Skills continuity will contain total cost of ownership while data governance will significantly influence benefit realisation timelines.

## 5.4 MyContent

The MyContent solution encompasses the implementation of a WCG wide Transversal Content as well as Record management system, a Correspondence Tracking System, a Supplier Invoice Tracking System, an Advanced electronic Signature system and a Digitisation initiative. Each capability was managed as separate, parallel streams.

The ECM stream was successfully delivered at the end of 2015/16. Supplier Invoice Tracking System implemented in Q3 2015/16. Archive Holdings Digitisation commenced in Q4 2014/15 and due to complete the initial phase in Q3 2016/17. Advanced Electronic Signatures commenced in Q1 2015/16 and due to complete in Q3 2016/17. Figure 17 illustrates the MyContent timeline until the end of 2016/17 financial year.

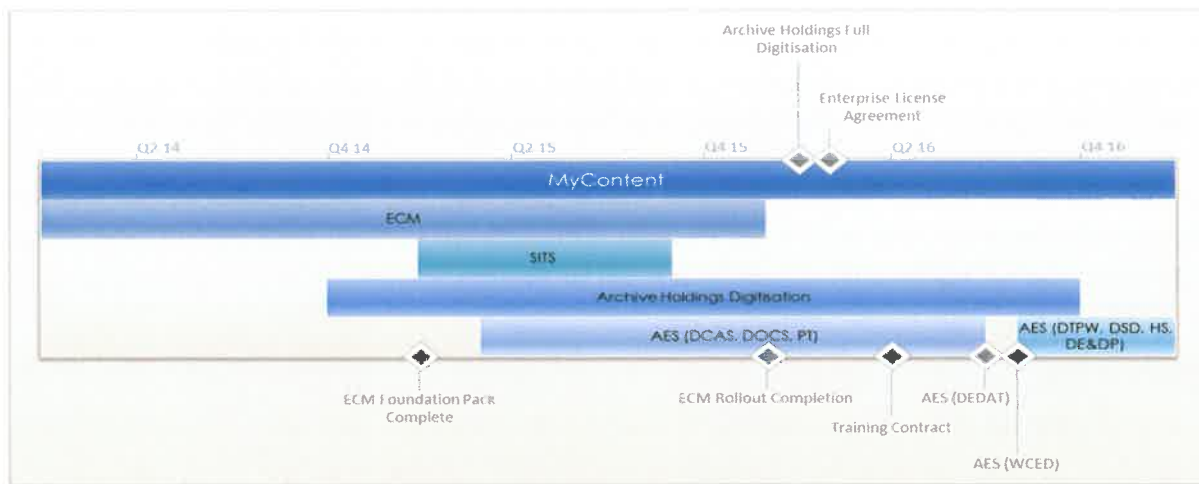


Figure 17: MyContent Timeline

Department	ECM	AES	SIT
DCAS	Implemented	Implemented	Implemented
DEA&DP	Implemented	Planned for 2016/17	Implemented
DEDAT	Implemented	In Progress	Implemented
DHS	Implemented	Planned for 2016/17	Implemented
DLG	Implemented	Not Scheduled	Implemented
DoA	De-Scoped	Not Scheduled	Not Scheduled
DOCS	Implemented	Implemented	Implemented
DoH	Implemented	Not Scheduled	Not Scheduled
DotP	Implemented	In Progress	Implemented
DSD	Implemented	Planned for 2016/17 *	Not Scheduled
DTPW	Implemented	Planned for 2016/17 **	Implemented
PT	Implemented	Implemented	Implemented
WCED	Implemented	Scheduled for 2016/17	Implemented

\* Pending acceptance of MyContent and AeS projects

\*\*Pending completion of Migration to Consolidated Environment

Table 10: MyContent Implementation Status

Table 10 illustrates the MyContent implementation status. Implementation refers to the deployed solution and does not reflect the institutionalisation of the solution.

### 5.4.1 MyContent Financial Summary

The MyContent budget versus actual spend is represented in Table 11.

(R'000)	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
<b>Allocated Budget</b>	25,000	50,000	225,000	16,057	19,161		
<b>Actual Spend</b>	10,444	44,500	39,950				

Table 11: MyContent Budget versus Spend

### 5.4.2 MyContent Review Synopsis

The implementation of ECM in DSD, DTPW, DOH and DotP, has led to significant gains in consolidation, standardisation, economies of scale and extended footprint of ECM in the WCG. However the review did not specifically focus on these legacy implementations. The review was primarily limited to the Transversal implementation of the MyContent Foundation Pack, including selected additional modules. The adopted implementation model, MyContent Foundation Pack 100 user pilot, has influenced the high departmental demand for ECM capabilities.

Across the WCG Suite strong business leadership from Project Managers exists. The ECM Project Manager, in particular, displayed very strong business case ownership, managing the project beyond existing constraints.

As with the rest of the WCG Suite, ECM benefit realisation is very dependent on effective change management. Despite the MyContent team identifying this critical dependency, change management efforts were not sustained.



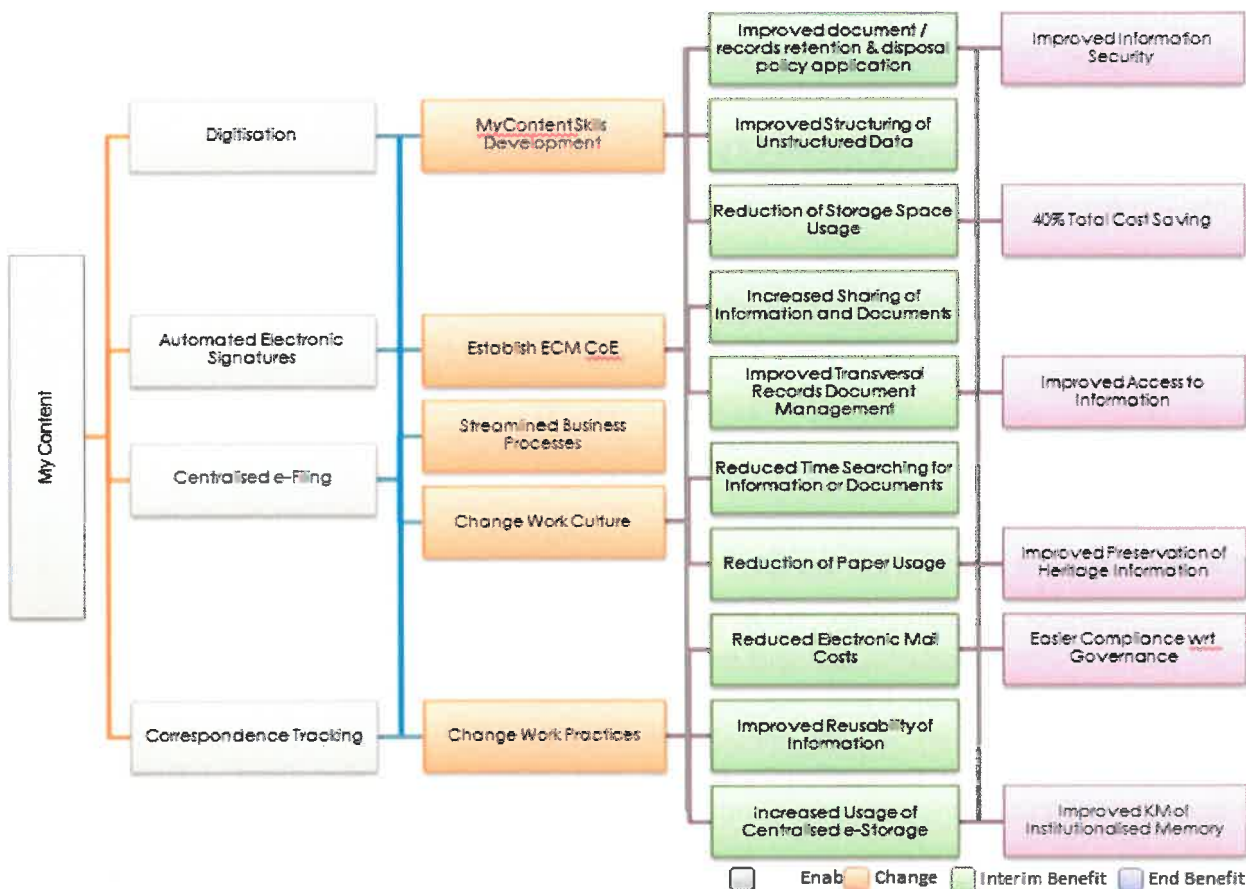


Figure 18: MyContent Benefits Realisation Map

ECM solution capability, as with the rest of the WCG Suite, is just the first step. The solution has largely been developed and benefits are being realised. To sustain the momentum achieved, work culture needs to be change managed. This will speed up the realisation of trailing benefits such as reduction in paper usage, improved information reusability and increased usage of centralised e-storage. To improve benefits realisation, rollout velocity needs to be sustained especially considering that an Enterprise License Agreement has been procured.

The solution capacity is a key risk to user adoption. As the solutions were rolled out to departments, system scalability issues compromised system performance. From a functional perspective, solutions achieved initial success based on implementing in mature business environments. Solution usability challenges became evident as the solutions were implemented in less matured business environments.

Initially only 100 users were contracted to be trained per department. The 100 users were achieved, but this was insufficient. A new training tender has been concluded which will result in the training of all identified users. The ECM User training tender, caters for a range of skills and capabilities such as MyContent Essentials, Super User and Train the Trainer to empower departments to become self-sufficient. Departments also requested additional capabilities and or workflows which led to the procurement of a flexible Enterprise Licensing Agreement (ELA) incorporating 33 000 licences as well as a comprehensive Suite of ECM products. The ELA was negotiated at a significant discount.



An ECM Centre of Excellence (CoE) has been established; however, this is largely constituted of vendor resources. In the case of ECM, skills availability might not be a critical issue based on the current vendor's competence and service. However, skills continuity remains a risk because of insufficient in-house ECM skills. This also creates a dependency on the current vendor.

Adoption has been inhibited partially because of insufficient early stakeholder collaboration. Early stakeholder collaboration was compromised as result of expediting project commencement and opting to achieve early traction and implementation. Furthermore, the project team needed to understand ECM capability in order to shape fit for purpose solutions. This influenced opting for implementing generic solutions. Generic solutions have impeded adoption. Going forward, it might be prudent to cement an explicit standardisation and customisation strategy as this will significantly influence finding the balance between total cost of ownership and fit for purpose departmental solutions.

Furthermore, Change capacity has impeded streamlining business processes and changing the work culture. Change capability and capacity will continue to be a critical success factor to realising ECM benefits.

Reduction of storage space cannot be achieved as current policies require hardcopies to be retained. Business processes have been automated but need to be documented before it can be constituted as achieved. For benefits to be realised for correspondence tracking, all users need to be licensed and trained. The enterprise license agreement and training contract has enabled benefits to be realised going forward.

The project has contained vendor expenditure by ensuring departmental readiness prior to engaging the vendor. MyContent has developed a repeatable implementation/rollout recipe which has enabled the project to implement the functionality in a predictable timeframe after the client has articulated requirements. It has an explicit approach to assisting the client to articulate requirements.

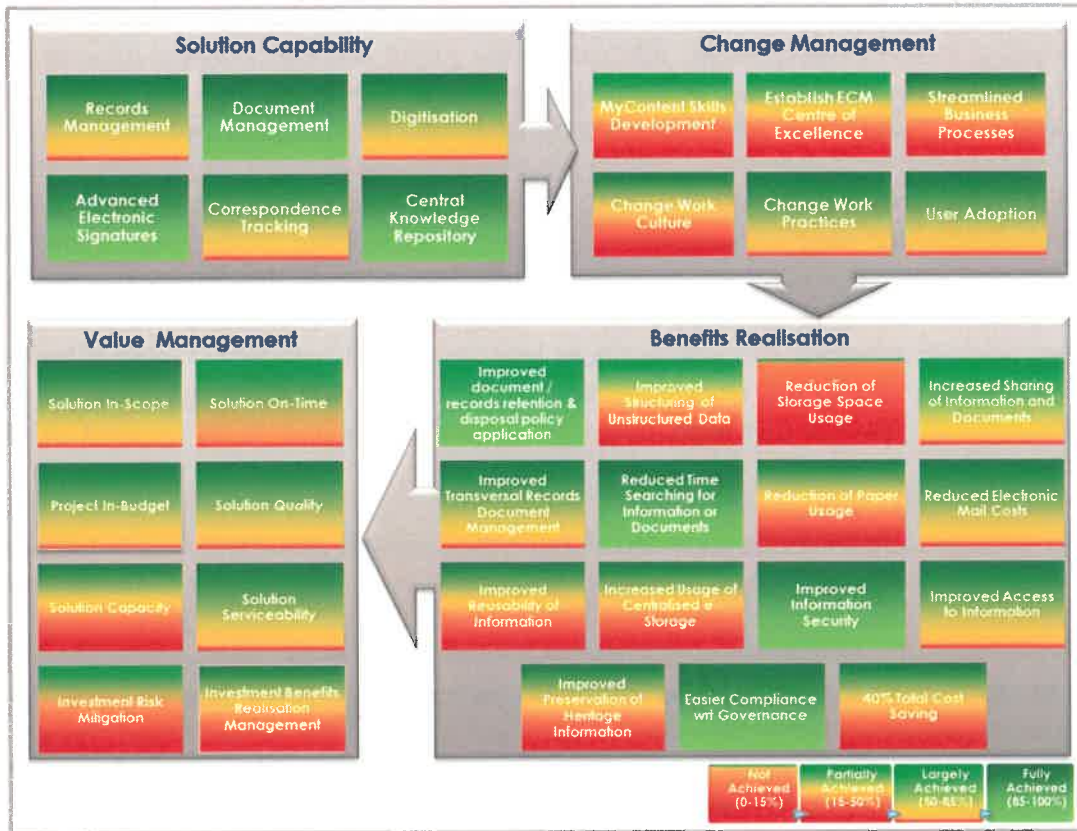


Figure 19: MyContent Benefits Realisation Management Heat Map

Initially a “go wide” approach was adopted, on-boarding eight departments in addition to the DCAS ECM implementation. This led to the user adoption illustrated in Figure 20. DoA has been excluded from the scope of the current ECM rollout, as DoA is not on the WCG network. The latter is currently a pre-requisite.

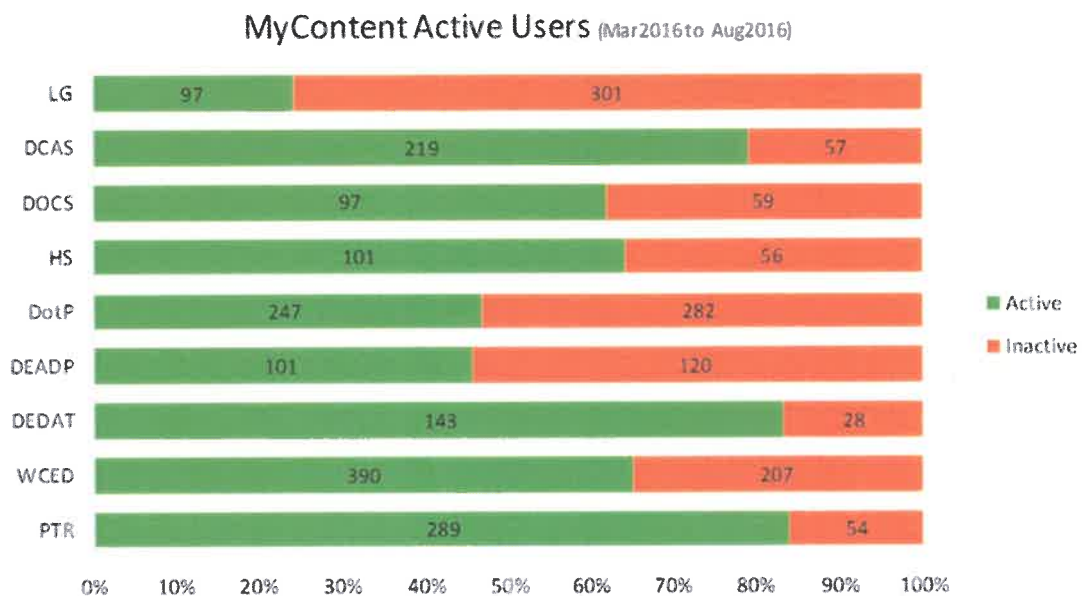


Figure 20: MyContent Active Users

A revised "go deep" approach has recently been adopted, with Provincial Treasury the first department identified for multi-level, end to end rollout. The "go deep" Provincial Treasury implementation includes:

- Full implementation of the MyContent Foundation Pack
- All users licensed to use MyContent
- All Users fully trained
- All SMS members received Advanced electronic Signature capability
- Premium Support

Other ECM / MyContent success stories include:

- Khayelitsha Hospital ECM implementation received an international award. It is a key example of citizen high value impact, more so when one considers it from a socioeconomic perspective. Reduced queues, no longer searching for files, received International recognition
- Preservation of heritage documentation which is often used and susceptible to loss and damage
- Supplier Invoice Tracking has assisted in invoices being paid within 30 days. A significant contribution to enabling and empowering business, especially in context of SMMEs and achieving financial compliance.
- Automated Electronic Signatures has already shown significant time and cost savings
- Transversal Approach has contributed to a significantly reduced total cost of ownership. Correspondence tracking implemented in 10 departments at a cost less than R1 million per department. This is a third of the cost when compared to a non-transversal approach.

This project offers crucial learnings which could be mined to enable the WCG to tailor its internal change management capability. Change management effectiveness seems dependent on domain knowledge and not only technical change management expertise. This is similar to project management i.e. project management effectiveness and efficiency increases in line with the PM's level of domain expertise. It will also be useful to consider a centralised CoE model with decentralised change managers who have the domain expertise of the areas they serve.

Some negative sentiments were expressed that should be further pursued and incorporated in lessons learnt. These sentiments emanate from the following:

- ECM system not available when required (system availability).
- All ECM solutions (new & existing) should be transversally supported (end-to-end).
- ECM usability as a result of compromised support capacity (ease of use).
- Reduction in paper benefits not realised (policy).
- ECM investment required beyond initial setup (total cost of ownership).
- Management of stakeholder inter-action and expectation throughout the project lifecycle (engagement).
- ECM solution integration with other systems (ease of access).

Any negative sentiment towards ECM should be investigated and resolved as the review has largely picked up a success story. The predictors to success, the current state and the general project success factors unfold a consistent story with the very likelihood that benefits will be realised as anticipated. To follow through on what has been achieved to date sufficient momentum should be maintained. This requires developing a value and benefits realisation roadmap in context of an austere environment.

## 6 Roadmap

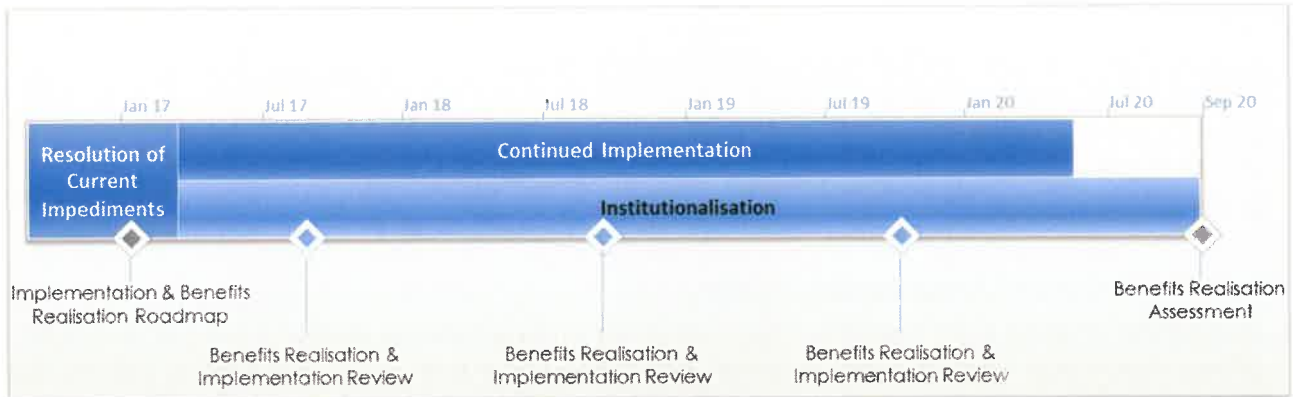


Figure 21: WCG Suite High Level Timeline

The high level WCG Suite timeline is illustrated in Figure 21. An implementation and benefits roadmap will be developed separately. An annual benefits realisation and implementation review will be scheduled as input to MTEC. The roadmap will reflect integrated implementation and institutionalisation deliverables and milestones.

## 7 Conclusion

Whilst significant milestones have been reached over the last three (3) years (with the foundation for transversal systems being laid and solution capability enabled) there is, however, still significant work required over the next 2-3 years, to further develop, implement, stabilise and institutionalise the WCG Suite. This has to be done in an austere environment, with reduced resource allocations (as depicted in Figure 22).

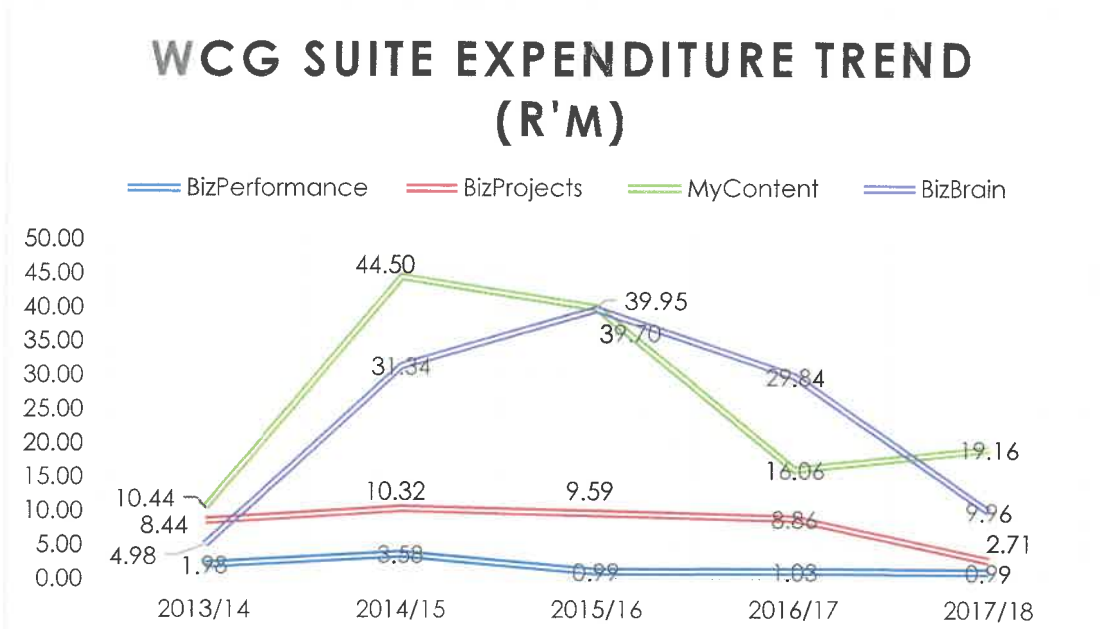


Figure 22: WCG Suite Budget Allocation

The WCG Suite Expenditure illustrated in Figure 22, largely shows a reduction in resource allocations going forward. This is because the initial scope of BizProjects & BizPerformance is expected to be fully implemented by the end of 2016/17. BizBrain is expected to achieve a 60-70% Departmental coverage by end 2016/17. The BizBrain funding should be reviewed in line with the expectation that 100% Departmental coverage will be achieved during 2017/18. In addition, WCG BI maturity is likely to increase demands for further BI enhancements as the rollout progresses. This will place additional pressure on the transversal team. From an ECM perspective, the newly adopted "go deep" approach will require sustained funding.

From a benefits perspective, the WCG Suite is largely on track to achieve the expected benefits, provided that the current impediments are resolved as planned and that critical success factors are effectively managed. The WCG Suite benefits realisation critical success factors include:

- Driving adoption and institutionalisation
- Ensuring explicit standardisation and customisation policies
- Delivering on the Data Governance project
- Maturing TAPS service management
- Resolving Infrastructure stability and scalability
- Achieving the required Departmental capacitation



Furthermore, management should focus on the following areas:

- Planning: Develop an integrated master plan to drive out benefit realisation and key benefit realisation dependencies. Include resolution of known impediments and critical success factors.
- Stakeholder Management: Address key stakeholder concerns and expectations.
- Change Management: Enable adoption and institutionalisation.
- Knowledge Management: Lessons learnt consolidation to make explicit the institutional memory, especially with regards to how teams mitigated challenges.
- Organisation Design: Ensuring sufficient capacity (in departments and transversally).
- Resource Management: Departmental capacitation to enable implementation and institutionalisation of systems.

The WCG Suite is poised to realise anticipated benefits. The approach taken by the WCG to address the critical success factors and management focus areas will determine the value at which these benefits will be realised. It should be noted that this report has been reviewed by Gartner (from an IT Value and Benefits Management perspective). Gartner endorsed the WCG methodology and approach taken. The Gartner analyst emphasised the need to focus on driving the benefits realisation / value management agenda.



## 8 Annexure A: Standish Chaos Report 2015

<b>Project Success Factor</b>	<b>Description</b>
<b>Executive Support</b>	Executive or group of executives agrees to provide both financial and emotional backing. The executive or executives will encourage and assist in the successful completion of the project.
<b>Emotional Maturity</b>	The collection of basic behaviours of how people work together. In any group, organization, or company it is both the sum of their skills and the weakest link that determine the level of emotional maturity.
<b>User Involvement:</b>	User involvement takes place when users are involved in the project decision-making and information-gathering process. This also includes user feedback, requirements review, basic research, prototyping, and other consensus-building tools.
<b>Optimization</b>	Optimisation is a structured means of improving business effectiveness and optimizing a collection of many small projects or major requirements. Optimization starts with managing scope based on relative business value.
<b>Skilled Staff</b>	Skilled Staff are people who understand both the business and the technology. A skilled staff is highly proficient in the execution of the project's requirements and deliver of the project or product
<b>Standard Architectural Management Environment</b>	SAME is a consistent group of integrated practices, services, and products for developing, implementing, and operating software applications.
<b>Agile Proficiency</b>	Agile proficiency means that the agile team and the product owner are skilled in the agile process. Agile proficiency is the difference between good agile outcomes and bad agile outcomes.
<b>Modest Execution</b>	Modest execution is having a process with few moving parts, and those parts are automated and streamlined. Modest execution also means using project management tools sparingly and only a very few features.
<b>Project Management Expertise</b>	Project management expertise is the application of knowledge, skills, and techniques to project activities in order to meet or exceed stakeholder expectations and produce value for the organization.
<b>Clear Business Objectives</b>	Clear business objectives are the understanding of all stakeholders and participants in the business purpose for executing the project. Clear Business Objectives could also mean the project is aligning to the organization's goals and strategy.

Table 12: Chaos Report Project Success Factors

## 9 Annexure B: Abbreviations

Abbreviations used in the document are listed below:

<b>Term</b>	<b>Definition</b>
APP	Annual Performance Plan
C e-I	Centre for e-Innovation
PSG	Provincial Strategic Goal
PWME	Province-Wide Monitoring and Evaluation
TAPS	Transversal Applications Development & Support
WCED	Western Cape Education Department
WCG	Western Cape Government
DCAS	Department of Cultural Affairs
DEA&DP	Department of Environmental Affairs and Development Planning
DEDAT	Department of Economic Development and Trade
DHS	Department of Health Services
DLG	Department of Local Government
DoA	Department of Agriculture
DOCS	Department of Correctional Services
DoH	Department of Health
DotP	Department of the Premier
DSD	Department of Social Development
DTPW	Department of Transport and Public Works
PT	Provincial Treasury
WCED	Western Cape Education Department
PTM	Provincial Top Management
ECM	Enterprise Content Management
EPM	Enterprise Portfolio Management
P3M	Project, Programme and Portfolio Management

Table 13: Abbreviations