

# Creating a Collaborative Culture for SME Growth

SIUE Project Management Symposium

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*"The basic economic resource - the means of production - is no longer capital, nor natural resources, nor labor. It is and will be **knowledge.**"*

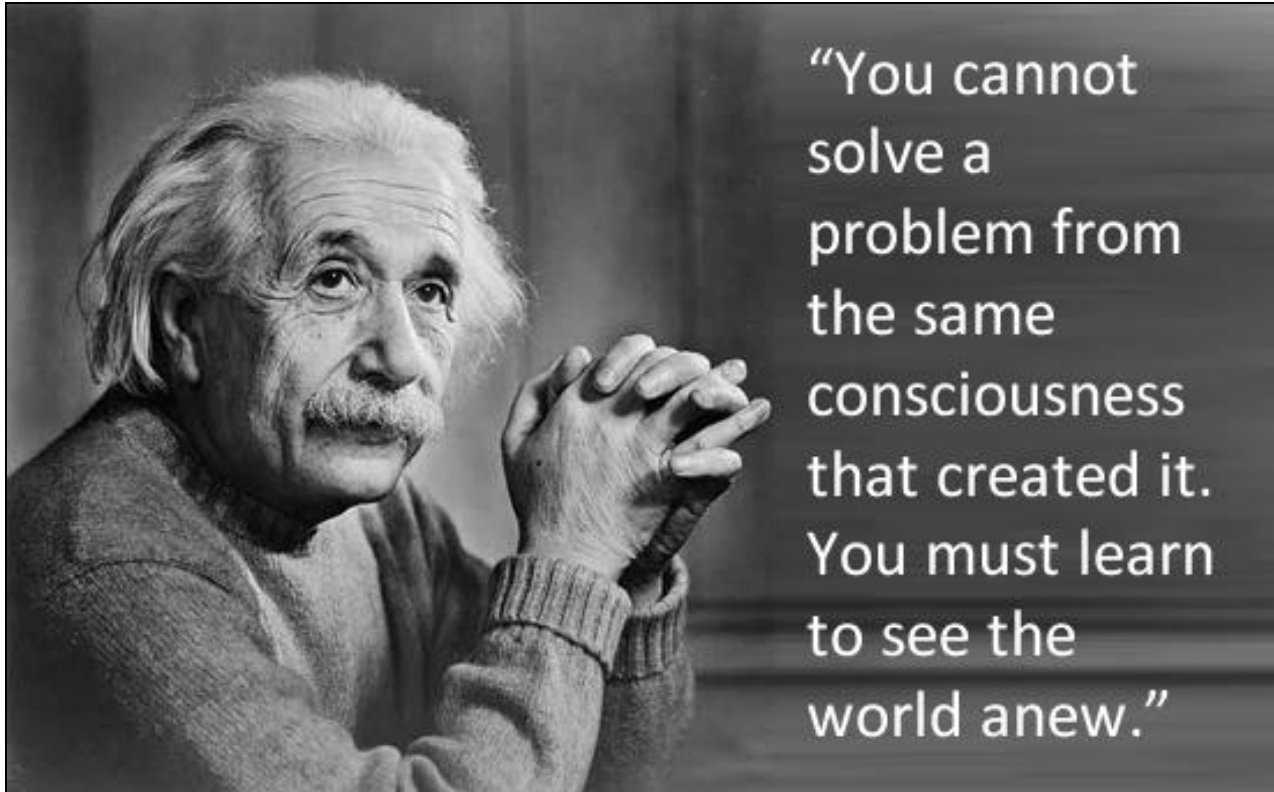
**- Peter Drucker**

# What's the "right" question?

*"Do we have a SME problem?"*

*"How can we grow SMEs faster?"*

# How do we define a "SME"?



“You cannot solve a problem from the same consciousness that created it. You must learn to see the world anew.”

# Identity Crisis

- Business/Systems Analyst**
- Programmer/Developer**
- Domain Expert**
- Project Manager**
- Stakeholder**
- Sponsor/Executive Sponsor**
- Product Manager**
- Quality Assurance**
- Subject Matter Expert (SME)**



# Brutal Facts



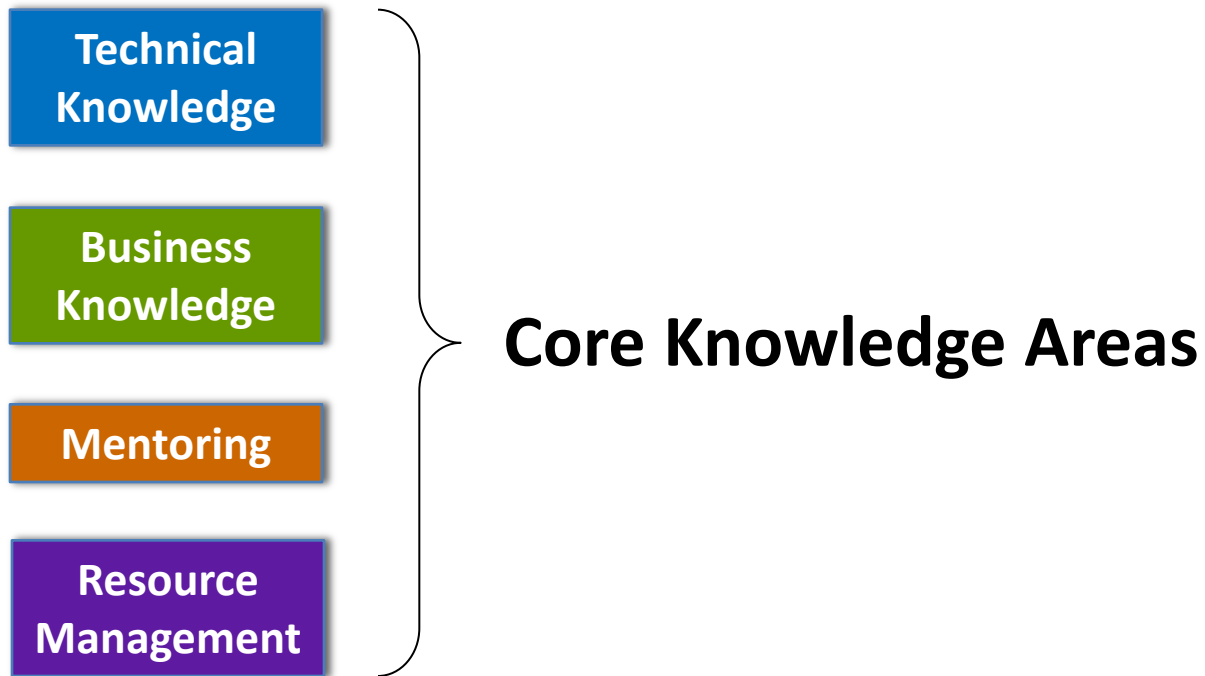
- The definition of "SME" is misunderstood, and inconsistent.
- "Name-dropping" limits new growth.
- High contractor-to-SME ratios increases SME demands.
- Systems are poorly documented.
- Most SMEs will leave within the next 10 years.
- Many organizations do not proactively support SME growth.

# Goals



- Define "SME" by a common framework to align thinking.
- Create tools that support collaboration and commitment.
- Focus SME growth on top impacted systems.

# Defining a "SME"





**Technical Knowledge**

System Integration  
(Internal / Vendor)

Technical Requirements

Estimating

Technical Design

Spec Creation

Configuration

Infrastructure

Programming

M/F

Test Planning / Coordination

Web

**Business Knowledge**

Application  
Business Rules

Business Requirements

Business Design

Test Planning / Coordination

Firm Impacts

**Mentoring / Coaching**

**Competencies**

- Communicates Openly
- Develops Others
- Takes Ownership

Document Processes

System Training

Test Planning / Coordination

**Resource Management**

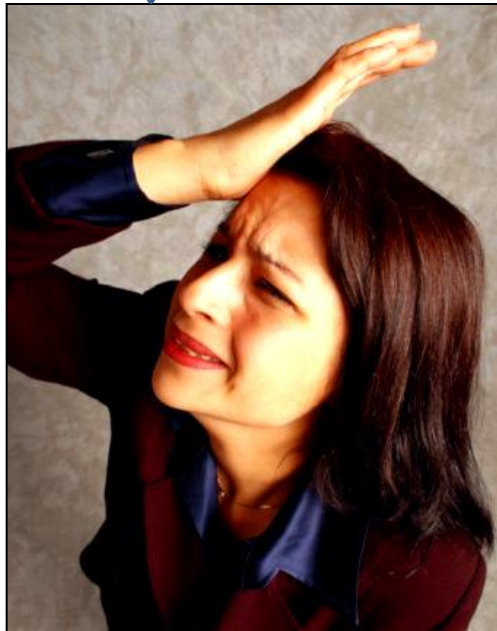
Quality Reviews

Technical Leadership

**SME Knowledge Areas**

# SME Disconnect

I HAVE to hit my deadline date. I need THE BEST on my project. I need Tom!



Um, Tom, isn't available; your project is going to have to wait.



# "Name that SME"

SMEs	System	# Projects
Joe Smith	Compliance	26
John Kotter	Statements	23
Indiana Jones	Account Access	18
Lara Croft	Account Transfers	16
Jerry McGuire	Portfolio	15
Cruella DeVille	Relationship Manager	14
Minnie Mouse	Customer Accounts	14
Clark Kent	Cash	12
Denzel Washington	Mutual Funds	11
Betty Cook	Trades	11

# Who can help me to grow?

Functional  
Leader

PMO

Project  
Manager

SME

Sr.  
Leadership



**"Successor SME"**

# Team Expertise & Depth (TED)

Save Manage Associates & Systems Back Next

Employee	Order Activity Mainframe	Order Activity Mainframe	Order Activity Open Systems	Order Activity Open Systems	Product Master File	Product Master File	Trade Corrections	Trade Corrections	Coaching/Mentoring	Resource Management
	Technical	Business	Technical	Business	Technical	Business	Technical	Business		
Baker,Rod	Low	Low	N/A	N/A	Med	Med	Low	Low	Med	N/A
Cody Miller	Low	Low	Med	Med	N/A	N/A	Med	Med	Med	Low
Gina Trani	Med	Med	N/A	N/A	Low	Low	Low	Low	Low	Low
Mark Robinson	Med	Med	N/A	N/A	Low	Low	Low	Low	Med	Low
Michael Watt	Med	Low	N/A	N/A	Low	Low	Med	Med	N/A	N/A
Scott Ward	High	High	N/A	N/A	Med	Med	Med	Med	High	Med
Walker,Michael	Low	Low	N/A	N/A	Low	Low	Low	Low	N/A	N/A

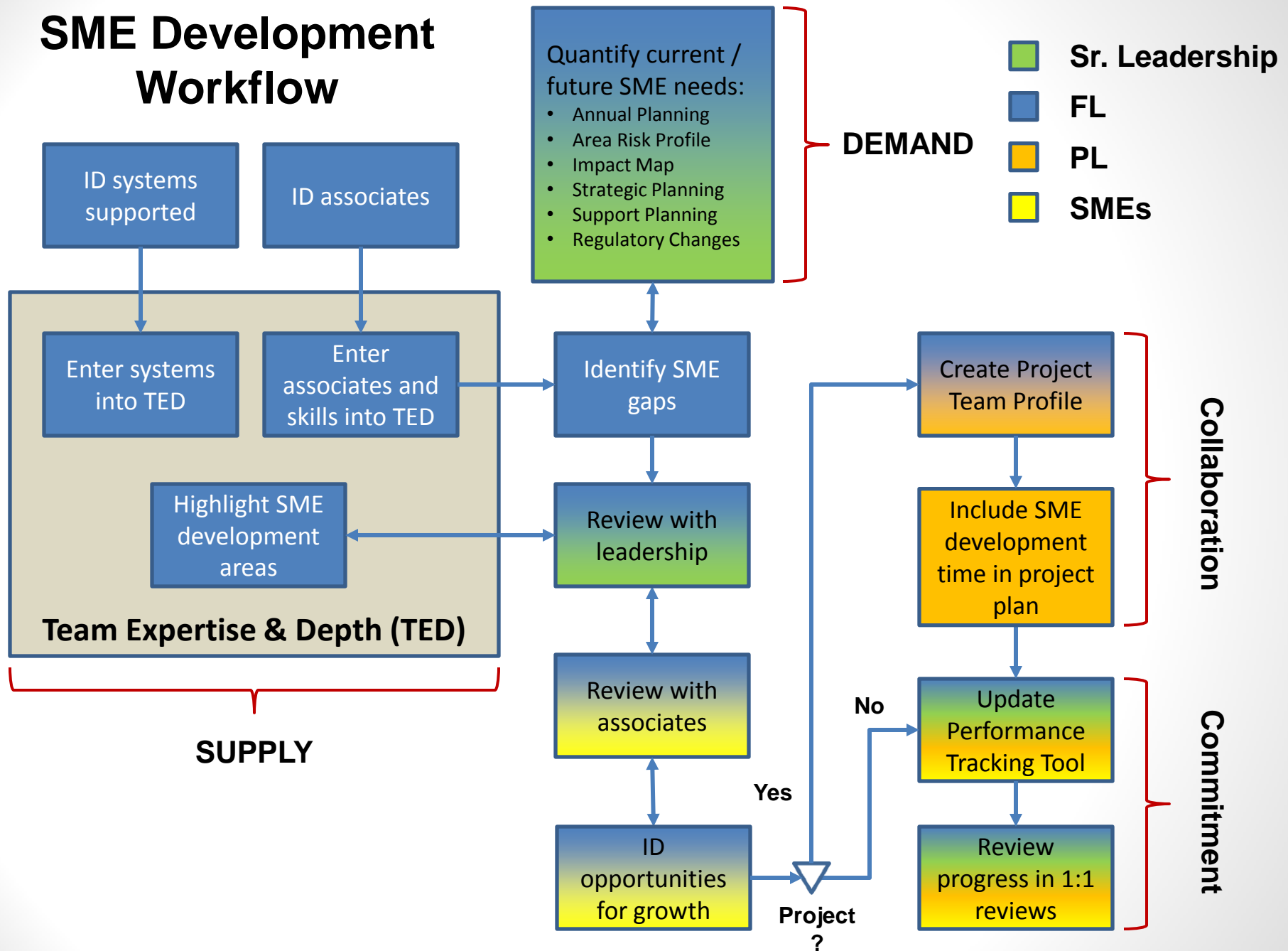
Definitions First Last

# Project Team Profile

		SUBJECT MATTER EXPERTISE (L/M/H)*				SME DEVELOPMENT		FORECASTED ALLOCATI							
Role	Team / System	Tech. Know.	Bus. Know.	Mentoring / Coaching	Resource Mgt.	Resource Name	Assoc / Contractor (A/C)	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13
								1	Project Leader	n/a				John Doe	A
2	Project Coordinator	n/a				Lisa Jones	A	0.5	0.75	0.75	0.75	0.75	0.75	0.75	0.75
3	Lead Analyst	Cash	H	H	H	M	Stephanie Hanes	A	0.5	0.75	0.75	0.75	0.75	0.75	0.75
4	Lead Analyst	Mutual Funds	H	M	H	L	Joe House	A	0.5	0.75	0.75	0.75	0.75	0.75	0.5
5	MF Programmer	Cash	M		H		Tammy Garden	A	0.25	0.5	0.75	0.75	0.75	0.25	
6	MF Programmer	Mutual Funds	M				Tom Murray	A			0.25	0.75	0.75	0.75	0.5
7	Java Programmer	Cash	M	M	M		Jessica Branch	A	0.25	0.5	0.75	0.75	0.75	0.25	
8	Java Programmer	Cash	L				Dan Rome	A	0.25	0.5	0.75	0.75	0.75	0.25	
9	MF Programmer	Trades	M	L			Michael Watt	A	0.25	0.5	0.5	0.75	0.75	0.75	0.5
10	MF Programmer	Trades	H	H	H	M	Scott Ward	A	0.1	0.25	0.25	0.5	0.25	0.1	0.1
11	MF Programmer	n/a				CONTRACTOR	C					0.5	0.75	0.75	0.75
12	MF Programmer	n/a				CONTRACTOR	C	0.25	0.5	0.75	0.75	0.75	0.25		
13	MF Programmer	n/a				CONTRACTOR	C	0.25	0.5	0.75	0.75	0.75	0.25		
14	MF Programmer	n/a				CONTRACTOR	C	0.25	0.5	0.75	0.75	0.75	0.25		
15	DBA	n/a				Ozzie York	A	0.1	0.25	0.25	0.5	0.25	0.1	0.1	0.1
<b>Totals</b>								3.95	7	8.75	10	10	6.95	5.45	4.7

\* Only required if expertise from a team or system is needed.

# SME Development Workflow



# SME Growth Performance Metrics

## Successor SME

Become proficient at supporting <system name or technology>, with a focus on <technology, business, mentoring/coaching, and/or resource management> skillset(s) by <commitment date>; leverage <project, enhancement, or support effort> as a training ground for growth.



## SME Mentor / Coach

Mentor / coach <Successor SME> to be proficient at supporting <system name or technology>, with a focus on building <technology, business, mentoring/coaching, and/or resource management> skillset(s) by <commitment date>; leverage <project, enhancement, or support effort> as a training ground for mentoring / coaching.



## Functional Leader

Conduct monthly and trimester reviews of Team Expertise & Depth with associate(s), department leader and director to track progress on SME development.

Work with <project leader(s)> to identify SME development opportunities within <project>.



## Project Leader

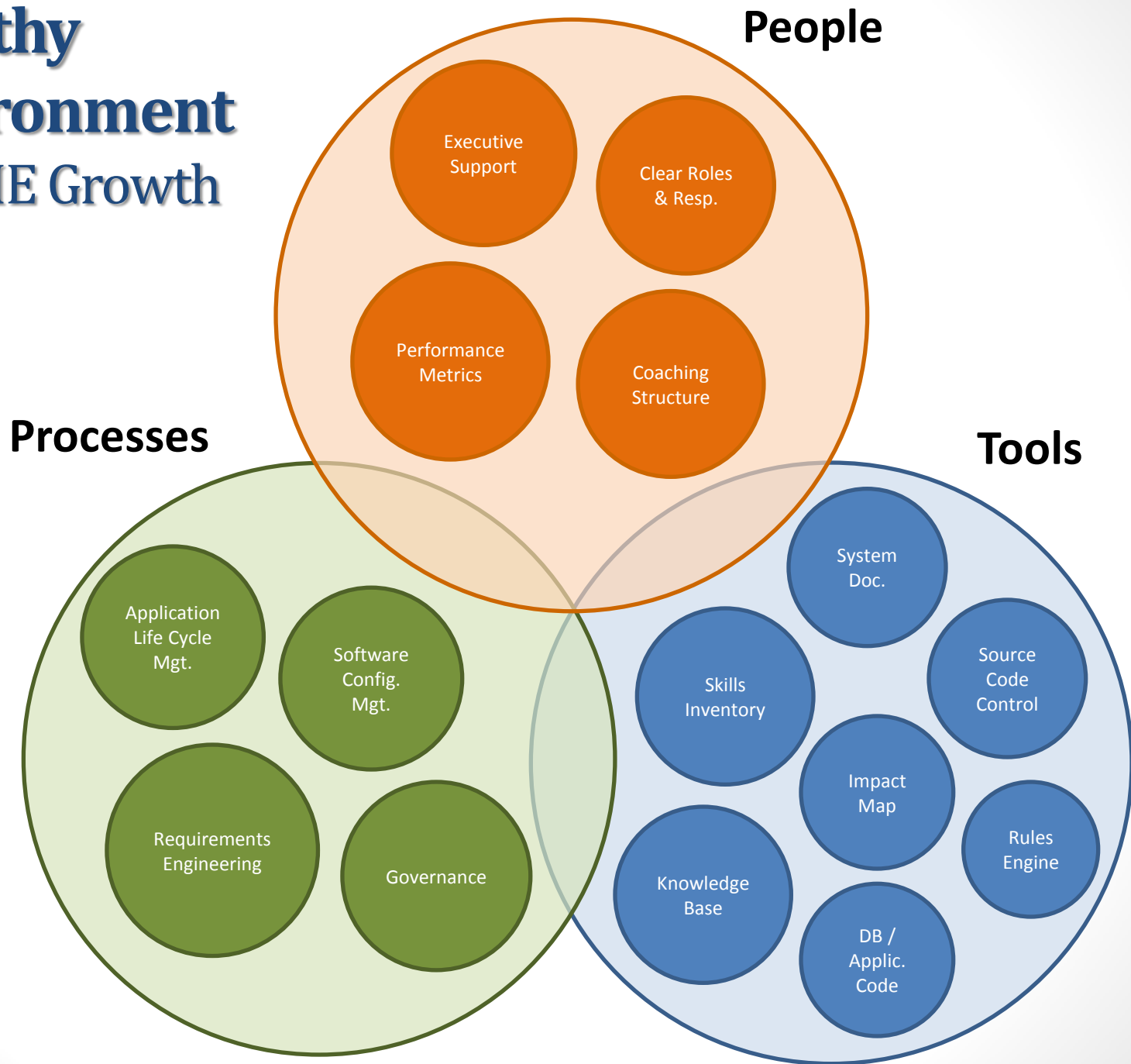
Work with <functional leader> to identify SME development opportunities within <project>.

Ensure project plan for <project> includes SME development time for <successor SME> to become proficient at supporting <system name or technology>, with a focus on <technology, business, mentoring/coaching, and/or resource management> skillset(s).

At project closing, meet with <functional leader> to confirm SME development objectives have been met for <project>.



# Healthy Environment for SME Growth





# Leading Above the "Death Line"

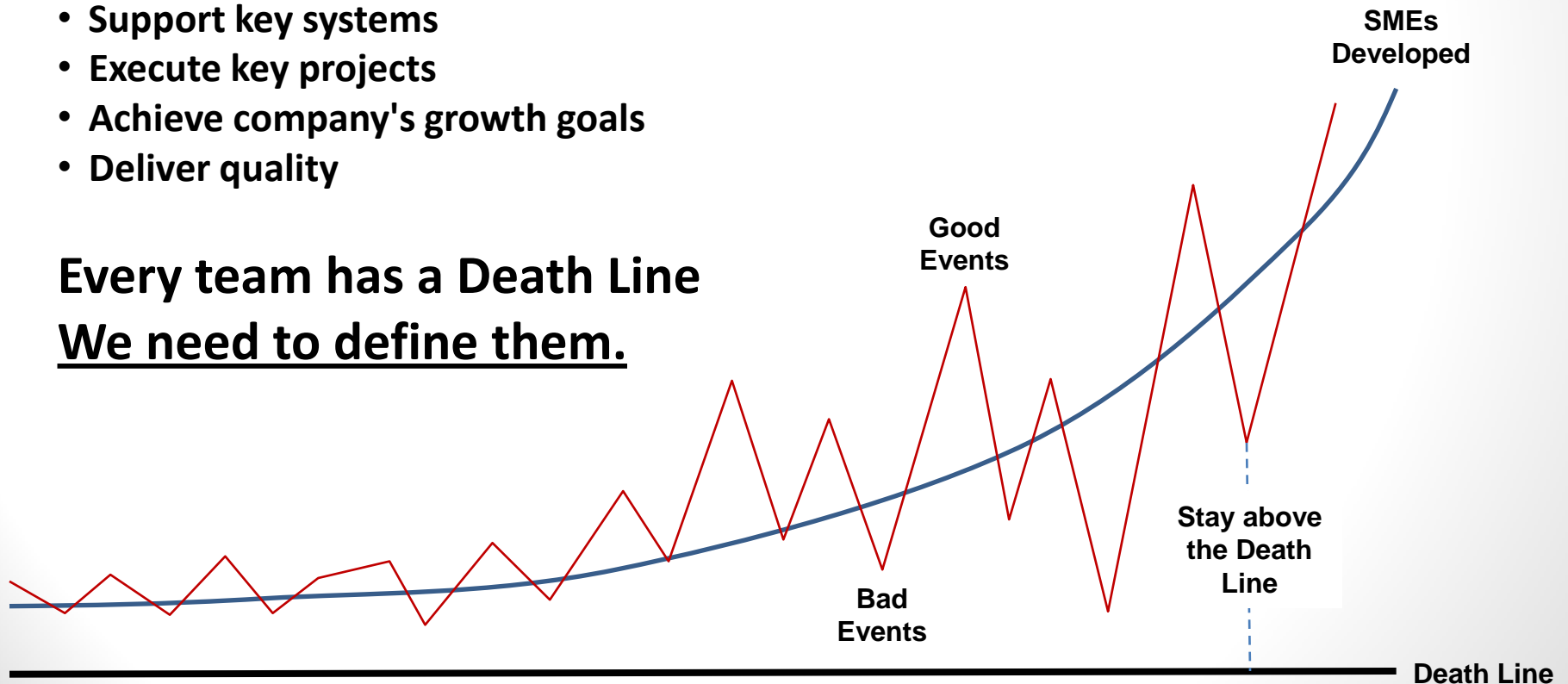


What is our "Death Line"?

SMEs required to:

- Support key systems
- Execute key projects
- Achieve company's growth goals
- Deliver quality

Every team has a Death Line  
We need to define them.



**"If we are growing, we are always going to be outside our comfort zone."**



**"The growth and development of people is the highest calling of leadership."**