

Guide to being a Business Relationship Manager (BRM)

What is the purpose of this guide?

This is a newly created job at the City and those taking on the role will be breaking new ground - and we hope building stronger, more productive relationships between IT and business units. We know what we *think* we want the BRM to do, and we've described that in this document, but we will need to learn from our experiences, and tweak the responsibilities over time. So, we hope that this guide will become the basis for a living document that we ask you to contribute to and shape based on your experiences of what works and what doesn't.

What is the job?

The BRM serves as the chief liaison between IT and the business units they are assigned. They represent IT (us) to the business units by promoting IT's vision, value, services and capabilities. They advocate on behalf of business units and stakeholders to ensure that IT services and capabilities meet their priorities and needs.

We want the BRM to be a trusted advisor with specific roles with regard to business-IT strategy development, solution discovery, service management, risk management and relationship management. They should provide strategic consulting level support and guidance. They also communicate decisions, priorities, and relevant information to appropriate levels of staff regarding service requests, projects and initiatives.

Individuals in this role must be able to communicate clearly, negotiate, listen, mitigate conflict, build alliances and achieve desired results using strong interpersonal and diplomacy skills. They work closely with others on intangible issues across organizational and departmental boundaries.

The Simplified Version

BRM's help business leaders and IT figure out how they want to use technology and helps both groups (IT and business units) figure out how to most effectively get it done.

What does the BRM do?

1. Foster, build and maintain relationships with leadership and staff at all levels, especially key decision makers
2. Establish a reliable and trusting partnership with service area leadership and staff AND with IT in order to become an active translator of information between the groups
3. Develop a deep understanding of the business goals, objectives and key processes of each of the business units assigned
4. Communicate to IT Management and staff the relevant business goals, objectives and issues and their implications
5. Manage stakeholder satisfaction with all IT services. Identify opportunities to optimize and improve IT Service Management processes and practices
6. Evangelize the corporate technology vision and create capacity within non-IT staff to do the same
7. Co-produce and manage business-technology plans with service areas/departments
8. Identify opportunities to automate and optimize business processes and develop (or support development of) requirements and a supporting case to innovate business processes
9. Help manage the project intake process
10. Leverage opportunistic business moments in order to troubleshoot, problem solve and help deliver solutions for the service areas
11. Work through IT to align and integrate solutions (ex. shared processes) within and beyond departments, leveraging enterprise solutions where practical as well as opportunities to purchase services (versus build in-house)
12. Identify opportunities to consolidate and deliver system training for staff
13. Identify up front and track post implementation business benefits realization successes and challenges
14. Define business level specific metrics and develop information dashboards for management
15. Provide support to deliver reporting and analytics to support departmental and organizational decision making

Maxims by which BRM's Work

1. Advocate for your Customer: you represent the 'voice of the customer', so within IT be an advocate for your customers, shout from the rooftops if you feel that your customers needs are not being addressed, or if the IT team is failing or ineffectively delivering services that hamper your customers ability to deliver its services - be willing to call out / challenge sub-par service performance
2. Be a sponge: learn as much as you can about your departments and their needs, look more broadly at what's going on in the City, what's going on in the industry and beyond. Be curious and open to new ideas, whatever the source.
3. Build strong relationships: your success relies on your ability to influence and that in turn is dependent upon the strength of your relationships with leadership, staff, and with key influencers throughout the organization - actively work on building strong relationships with your business units
4. Earn credibility by delivering: the BRM can only gain credibility by helping get things done, otherwise you will be seen as layer of bureaucracy. BRM's credibility is dependent upon delivery of the final product - so earn credibility by delivering.
5. Make connections: when working on new ideas look to involve all of the stakeholders, err on the side of over consultation not under-consultation, look to reuse something already done, or look to broaden the group to engage others that may benefit from a similar solution.
6. Take the initiative: be willing to take the first step to identify and address existing and potential obstacles, issues and opportunities
7. Do the right thing: don't short cut, take the time to do things right, but recognize that sometimes the tactical solution is required to earn you credibility to provide more strategic advice in future
8. Don't be a bureaucrat: your job is to help people get stuff done, you are a facilitator and helping hand - help people through processes, help them ask and answer the right questions don't make them fill forms and jump through hoops
9. Simplify and go: where possible work with the business to simplify requirements and solutions so that a minimum viable product can be implemented quickly and then evolved over time

What do you need to be a good BRM?

- Organizational awareness: you need to understand how the City works, what the strategic priorities and goals of council and the administration are, who does what, who the movers, shakers and decision makers are, how to get things done - through formal and informal channels. You need to be aware of changes to strategy, policy and organization and understand their impacts. You need to develop a deep understanding of your assigned business units and how they work - who are the influencers, how does the department management team function, what are the goals and objectives of the department and its leaders. You need to understand corporate processes - such as budgeting, resourcing, council reporting. You must also understand IT processes - such as incident and problem management, BRM's, project and portfolio management.
- Business Process Knowledge: you must develop a good understanding of key business processes within your business units
- Monitor market trends and best practices: you gather and analyse information on current and future trends and best practices. You keep up to date on technologies, tools and processes that are relevant to and used by your business units, by other leading municipalities and private sector organizations and emerging in the market place. You review trade press, attend conferences, network with peers, discuss with business units and reach out to other municipalities to identify emerging practices and opportunities. You conduct broad and detailed level research to understand the market. You monitor and analyze technology trends to determine the impact in your business areas.
- Authoritative and trusted advisor, providing innovative thought leadership: your knowledge, skills, experience, and excellent communication capabilities mean that your advice is trusted and sought. through your deep understanding of your service area's business goals, along with your technology experience and expertise - you are able to identify opportunities where technology can be used in innovative ways to achieve business goals
- Strategic Planning: you are able to recognize strategic opportunities, you help business leaders connect the dots between business and technology strategy, you take multiple inputs and help business

leaders formulate integrated business / technology strategies, you identify (through research) and communicate realistically what it will take to achieve the strategic goals identified

- Articulate strategy, plans and objectives to divergent audiences: your job is to help determine strategy and explain cogently strategies and plans to stakeholders. You can clearly explain to leadership and staff why a course of action is preferred.
- Change management: you understand the importance and fundamentals of change management and help business leaders understand the importance of, and the need to plan for change effectively
- Empathetic, active listening skills: the key to providing an effective solution is a complete understanding of the business - you listen before telling, you take your time to make sure you understand the need - you use the 5 why's to get to the core of the business problem
- Persuasion and negotiation skills: you have the communication and persuasion skills to shape and challenge business demand. If the demands is of low business value, they have to be able to help their customer recognize this and guide them to a more valuable need. You are able to negotiate compromises and secure commitments when required.
- Facilitation and collaboration skills: you have the skills to lead and facilitate teams of people working on collaborative endeavours to determine a mutually agreeable way forward.

Things that we don't want BRM's to do

It is critical that BRM's add value, therefore:

- Order taking: you are not an order taker. BRM's should be adding value by exploring ideas fully, developing options and concepts, working to deflect low value requests, while developing high priority initiatives.
- Account management: you are not an account manager, here simply to route requests to the right part of IT, the BRM plays a stronger role in helping to fully understand the needs, develop the approach, making strategic linkages where appropriate
- Gap filler: you are not here to fill any and all gaps in your business partner needs that are not being adequately met by IT - the role of the

BRM is to identify, escalate and resolve these issues - not mask them by filling the gap.

Tools that BRM's use

- BRM process
- Business Case
- Project Methodology
- Incident / Problem status reports
- Project Portfolio Status reports
- Stakeholder Reviews
- Word, Excel, PowerPoint, Eclipse, Service Request management

Getting up to speed as a New BRM

Within 2 weeks

- IT Team orientation / Corporate Orientation
- Eclipse training
- Overview of core business systems
- Overview of service desk operations and infrastructure architecture
- Overview of IT processes (BRM's, Project Methodology)
- Overview of Corporate processes (Budget, Resourcing, Hiring, etc)

Within 1 Month

- Meet with each business unit to understand methodology and function of each
- Meet with each department head within client

Within 2 Months

- Reconcile IT work plan with departmental/service area work plans to identify gaps
- Setup regular departmental management meetings within client base

Within 3 Months

- Fully aware of all IT services and capabilities
- Identify and develop a KPI definition for at least 3 metrics for 1 department

Within 6 Months

- Facilitate business automation/system automation for client base
- Draft technology plan for at least 1 department client base

Within 12 Months

- Draft technology plans for multiple departments
- Support departments through the budget process - ensuring that all technology initiatives are appropriately identified and reviewed
- Refine IT business engagement plan

Ongoing

- Monthly client meetings to review service desk and project status, and review future plans
- BRM Regular attendance at Dept. Management Team meetings
- BRM fully involved in Annual Dept. Budget planning
- Involvement in Business Plan development
- Establish 2 year business-technology work plans for all business units
- Regular Joint BRM-IT Management Team meetings to review business priorities and emergent issues
- Continuing development of business process knowledge

Complaints / Compliment Process

The City will implement a formalized complaint / compliments process for IT, that routes to the BRM's for resolution where required. This will provide BRM's with insight into Service Management issues and enable them to demonstrate their value to business units. Complaints should be tracked, reported and trends analyzed.

Accountability / Performance Measurement

The BRM owns the customer relationship and is accountable for the Customer Experience. The BRM's performance will be assessed annually by the CIO. This assessment will be supported by an annual questionnaire to each of the business units that the BRM is responsible for that will cover BRM performance, business value realization, customer service experience, overall IT satisfaction.

Further Reading

IT Business Partnerships: A Field Guide

https://www.amazon.ca/Business-Partnerships-Paving-Technology-Convergence/dp/0989380904/ref=sr_1_1?ie=UTF8&qid=1499814263&sr=8-1&keywords=IT+Business+Partnerships%3A+A+Field+Guide

ITIL Service Strategy

http://wiki.en.it-processmaps.com/index.php/ITIL_Service_Strategy