



**Metanoia**

# Strategic Engagement of IT and Business: State of the Art

BCS Consultancy SG Event 12<sup>th</sup> November 2019

Dr Alan Warr

μετάνοια

Metanoia – Shifting of minds

About the presentation

# Agenda

- 1 Background & history
- 2 Why it remains a challenge
- 3 IT engagement roles
- 4 Approaches to IT engagement
- 5 Engagement activities
- 6 Future of IT engagement
- 7 Resources for IT engagement



# Dr Alan Warr

MBA MSc PhD MBCS CITP FIC FCMI



## Digital Transformation Consultant

PA; BT; Kings Fund; Capita; KPMG; Metanoia



## Chair of BCS Consultancy Specialist Group

Formerly Vice Chair of Council of IBC



## Researcher in Organisational Transformation

Doctoral LBS, Post-Doc @ Wave Lab at Uni of the Aegean



## Former Lecturer in IT/Digital Strategy

Cranfield, Bournemouth, Henley

# Alan's experiences in strategic engagement



PA Consulting & BT Consulting

IT strategy & CIO advisory consultant



Bupa Group IS Division

Head of IT Business Consulting



States of Jersey Government IT

Interim Head of IT Business Support



Guys & St Thomas NHS Hospital

Interim Business Relationship Manager



Royal Brompton & Harefield Hospital

Interim Senior Business Relationship Manager



KPMG UK Digital & IT Divisions

(Interim) IT Business Relationship Manager

χαρμολύπη

Charmolypi – Joyful sorrow

The history of IT strategic engagement

# Strategic engagement at the dawn of IT





# A Rich History of Advice on Good Practices



1950s John Simons was crucial as a “maestro of technology” positioned between the top executives and the board on one side, and a strong technical team on the other.



1960s – “Managing to Manage the Computer”, James W. Taylor & Neal J. Dean, September 1966 issue. Finds a disastrous “faith and understanding gap” between IT & business requiring a linkage role.



1980s - Professor Michael Earl coined the term “Hybrid IT Managers” from research showing success at applying IT strategically was associated with an individual(s) with both business and technology capabilities.



CabinetOffice

1990s – Standards like ITIL and ISO20000 and CoBIT specifically include engagement roles and processes usually labelled business relationship management (BRM)



2000s – CIOs embrace BRMs which becomes a “movement”. Fast growth. Professional qualifications. BCS leads with ISEB Certificate in BRM. BRMi steps up in the USA.



2010s – Gartner estimates around 15% of corporate IT staff in an engagement role in USA. BRM teams now common. Title of IT Business Partner starts to gather traction. Investment & disinvestment by CIOs.

# Leading to a Growth in Specialist Engagement Roles

## IT Engagement Managers



## IT Business Relationship Managers



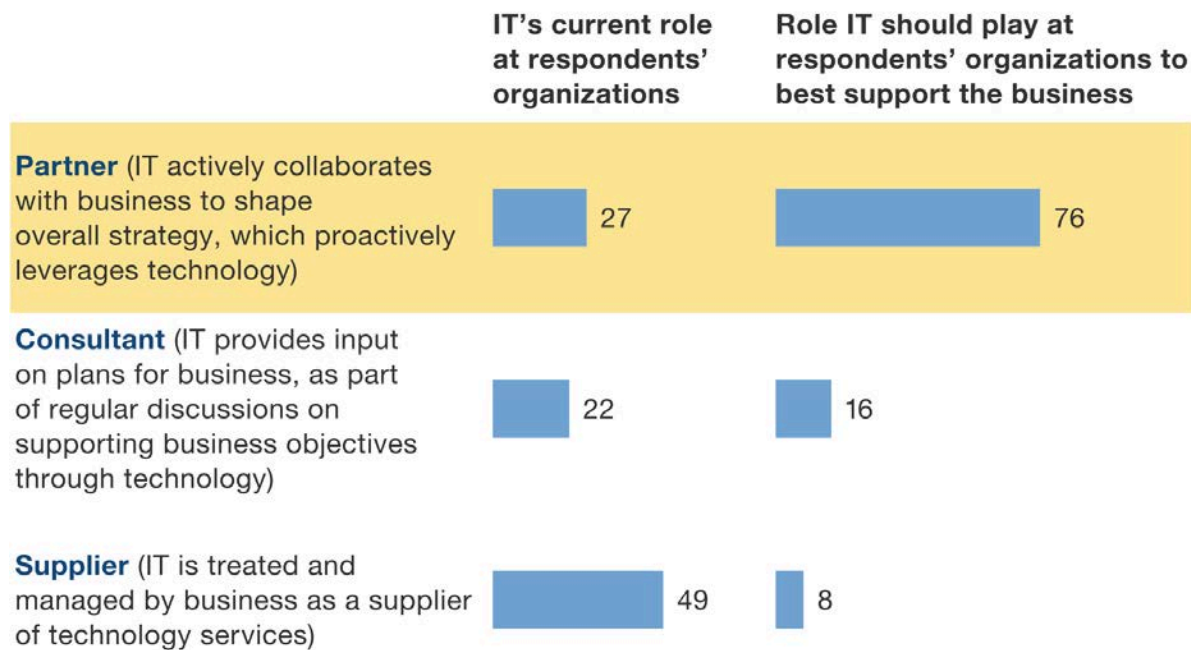
## IT Business Partners



# Yet the IT v Business Gap Remains Massive

IT rarely works as a partner with the business, but most executives believe it should.

% of respondents,<sup>1</sup> n = 709



<sup>1</sup> Respondents who answered "don't know" are not shown, so figures may not sum to 100%.

McKinsey&Company

The benefits of partnership are especially dramatic in innovation, culture, and performance management.

■ Asked of non-IT respondents  
■ Asked of IT respondents  
■ Asked of both IT and non-IT respondents

Areas where IT organizations are completely or very effective <sup>1</sup>	Likelihood of effectiveness at companies where IT is a partner, vs all others
Implementing bottom-up innovation ideas	3.43x
Creating a healthy and effective IT culture	3.27x
Measuring IT's performance on multiple dimensions	2.64x
Bringing ideas for new IT solutions to business	2.6x
Partnering with business to develop new capabilities supported by technology	2.5x
Proactively engaging with business leaders on new ideas or enhancements to existing systems	2.5x
Introducing new technologies faster and/or more effectively than competitors	2.29x
Working with business leaders to improve existing systems when asked	2.15x
Delivering new projects or enhancements on time and within budget	2.13x
Digitizing business processes	2.06x

<sup>1</sup> Respondents who answered "not at all effective," "slightly effective," "somewhat effective," or "don't know" with respect to each area are not shown. The survey asked about 14 total areas or activities. IT executives were asked about 7, and non-IT executives were asked about 8, respectively, but both groups were asked about creating a healthy and effective IT culture.

McKinsey&Company

μεράκι

Meraki – Devotion to an activity

Why it remains a challenge



# Service engagement in the comedy, the IT Crowd



<https://www.youtube.com/watch?v=rksCTVftjM4&list=RDrksCTVftjM4&index=1>

# Buzz Group Exercise 1

## State of Play at Your Organisation(s)



5 minutes

Informal groups of 2 or 3

Q: Where are your clients or organisations on strategic engagement?

# Exercise Debrief

## Your Stories: Most Amusing – Most Insightful



We have several centuries of experience in the room to draw upon!



# Common Mistakes: Three Case Studies

Organisation Type	Strategic Engagement Type	Mistake	Outcome
<b>Global Financial Services Firm with IT Directorate of 1000</b>  <b>“Half Measures”</b>	Strategic engagement team sponsored by CIO & CEO. All are IT strategy consultants from Big 4 & Big Tech.	Focused on business innovation where IT directorate happy to hand over the problem. Not given formal role in the IT operating model.	Drives huge value and popular business side but team burns out fighting the IT specialisms and disperses within 4 years.
<b>Healthcare Provider with IT Division as Separate Profit Centre</b>  <b>“Piggy in the Middle”</b>	Team of BRMs aligned to business silos. Tasked with making business happy despite underfunded and unresponsive IT.	Creating an intermediary between poor IT provision and business promising they will make things better.	Provider shelters behind BRMs and business units can place demands on BRMs despite underfunding. High turnover of BRMs inevitable.
<b>Government Org with 100 Person IT Department</b>  <b>“Not Focusing on Value”</b>	Several BRM teams embedded in business units believing they need to please their customers. Central IT functions providing services.	Value should determine demand not pleasing business leaders. BRMS & IT functions in conflict as do not have common goals.	All roles with an engagement component put through BRM training. Shared language and understanding improves relationships.



Ελπίδα

Elpida – Hope

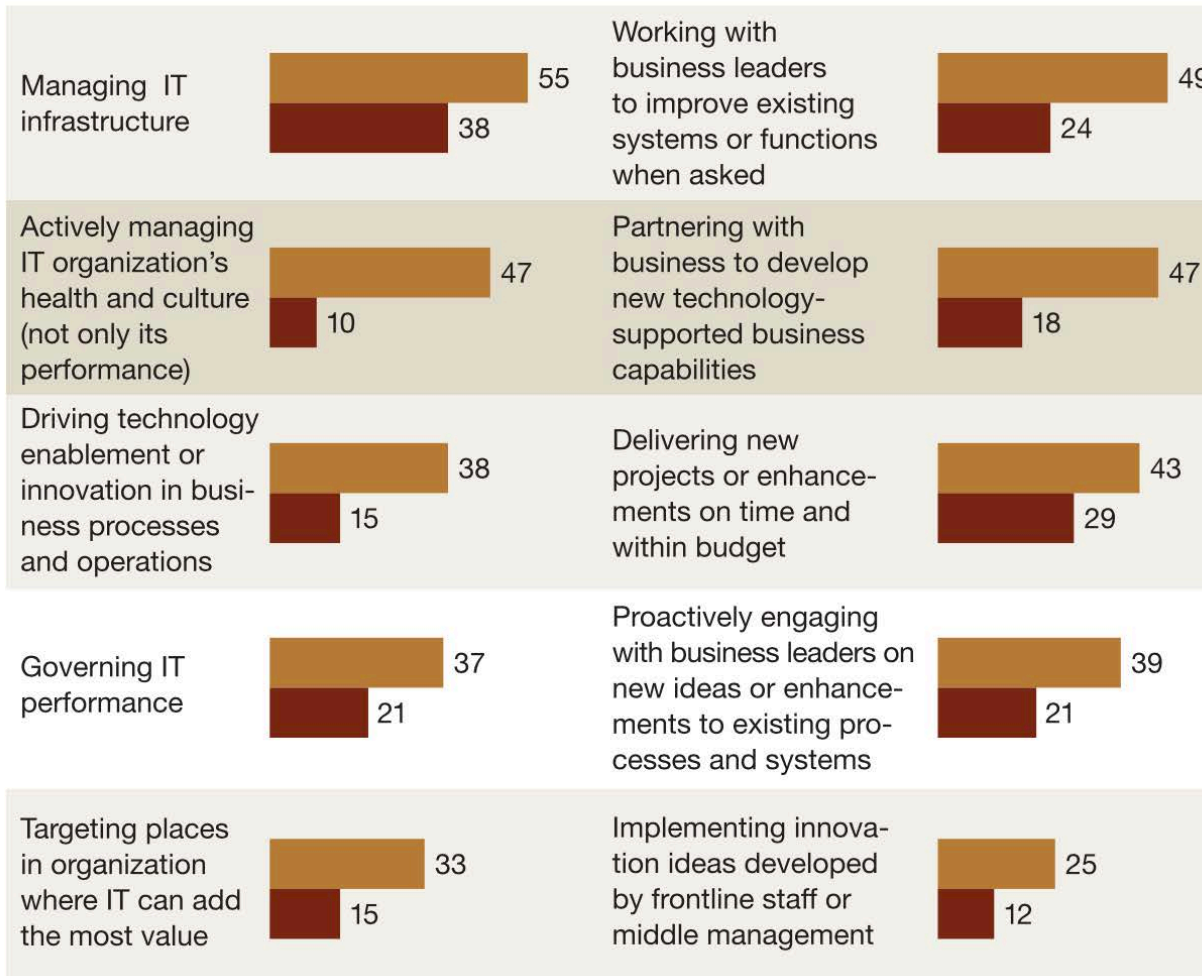
IT engagement roles

# CIO has Key Role in Engagement with Business

Processes where IT organizations are completely effective or very effective<sup>2</sup>

IT executives,  
n = 363

Non-IT executives,  
n = 350



- CIO is very or extremely involved in shaping business strategy
- CIO is somewhat or not at all involved in shaping business strategy

[McKinsey, "Why CIOs should be business-strategy partners", February 2015](#)

# Engagement is Everyone's Responsibility



Relationship building and perceptions of strategic engagement are forged at every interaction – whether between the business and IT professionals or with the IT processes and increasingly through self service engagements.

Seeing the BRMs or BPs as the sole contact point is another “common mistake”. They need to manage these relationship not take them over.

# Specialist Engagement Roles

## Partner

Ensuring that IT is an effective enabler by **connecting the business to the relevant area in IT.**

## Ambassador

**Promoting IT to the business** and educating IT on the needs and drivers of the business.

## Strategist

Works with the business to help understand **how their business direction will be underpinned by technology** provided by IT and the impact that IT has on the organisation & industry.

## Translator

**Promoting the use of simple, every-day terminology** to ensure that the business gets the IT solutions and services that it needs

## Analyst

Understanding business direction and helping **shape IT solutions** to match this direction

## Marketer

**Ensuring the technology deployed is being used** fully across the business

## Innovator

Making suggestions, introducing innovation and being **an advocate for what technology can provide. Challenging the business and ITS** to find the most relevant, most appropriate technology, based on innate knowledge of the line of business and requirements

# Contrasting Roles: Three Case Studies

Organisation Type	Dominant Role	Challenge	Outcome
<b>Global Financial Services Firm with IT Directorate of 1000</b>	<b>Innovator</b> – working with business units’ leaders to bring radical, new uses for technology that drive value.	Small engagement team of six former IT strategy consultants must orchestrate change through centralised IT structures.	Results flowed through with team initiating technology projects that drove hundreds of millions in new value but hard work.
<b>Healthcare Provider with IT Division as Separate Profit Centre</b>	<b>Ambassador</b> – focused on improving the broken relationship between IT and business units.	Six BRMs had to dig in and win back trust in IT one engagement at a time with IT division as a constant sea-anchor on progress.	Progress only made from “poor” to “better” over a long period but proved critical to the IT division but that went unacknowledged.
<b>Government Org with 100 Person IT Department</b>	<b>Partner</b> – re-connecting the business units and IT specialisms around commonly understood strategies.	Local and central IT teams were locked in conflict in a “them and us” way of thinking.	Common training in BRM across local and central IT teams led to a rapid re-appraisal and collaborative ways of working.

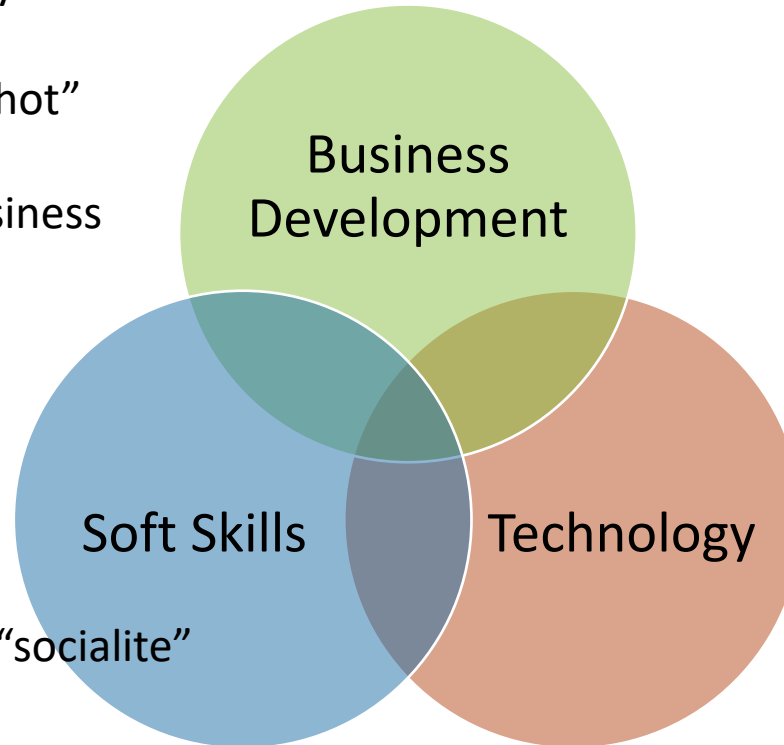
# Characteristics of BPs / BRMs

- Internal & high level, business & IT strategist specialised to business unit / industry

- Cannot show up as a “business hot shot”

- Able to shape demands from the business

- Must educate IT on the business



- Builder of trust relationships
- Cannot show up as “meeting stalker” or “socialite”
- Absorbs the “flack” and broker constructive actions
- Must influence but with little formal authority

- Business technology generalist, focused both on incumbent & future technologies
- Cannot show up as a “techie”
- Must educate business on the broad range of technologies
- Will need to deliver on neglected small technology needs – small stuff matters too

ψυχή

Psyhi – Soul

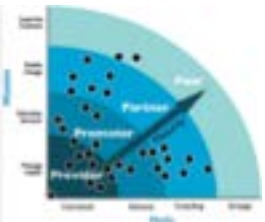
Approaches to IT engagement

# Strategic Engagement Maturity Models

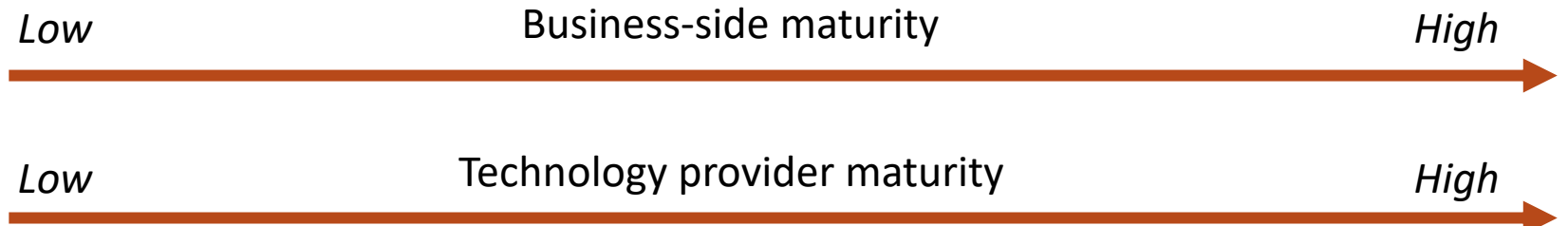
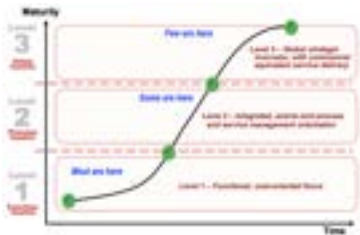
BRMI's BRM Maturity Model



CSC LEF's BRM Maturity Model



Vaughan Merlyn's Model





# Contrasting Maturities: Three Case Studies

Organisation Type	Business Leaders' Maturity	Tech Provider Maturity	Engagement Maturity
<b>Global Financial Services Firm with IT Directorate of 1000</b>	<b>Medium</b> – experienced on implementing big IT with forward plans that are specific and pro-active	<b>High</b> – acknowledged world-class CIO leading UK top 50 IT organisation. Big enough for engagement directly from IT vendors	<b>High</b> – able to reach “trusted advisor” and build “strategic partner” engagements with high caliber engagement staffing
<b>Healthcare Provider with IT Division as Separate Profit Centre</b>	<b>Low</b> – naïve IT demand & all at the last minute with anorexic funding assumptions. Extreme criticism of the IT provider.	<b>Low</b> – Underfunded and responding with inflexible services and long lead times using a waterfall only approach	<b>Low</b> – Struggling as an “order taker” but with senior managers demands of being high up the BRM maturity curve. High BRM turnover.
<b>Government Org with 100 Person IT Department</b>	<b>Low</b> – Ad hoc requests, IT strategies in some areas but without IT involvement, constant criticism of IT & CIO at all levels	<b>Medium</b> – Poorly funded, focused on basics & infrastructure, reluctant to take up ambitious goals	<b>Medium</b> - Surety as “order taker” being consolidated with progress to “service provider” being increasingly achieved

# Buzz Group Exercise 2

## What Is Your Best Advice on Engagement?



5 minutes

Informal groups of 2 or 3

Q: As a consultant or manager what has been your best advice on IT/business engagement ? Or best advice you've seen or heard?

# Exercise Debrief

## Most Valuable Piece of Advice and Why?



Shout out in a short, pithy format!



“You can’t talk IT strategy with the business if IT isn’t delivering their basic IT services well enough!”

αγάπες

Agapi – Love

Engagement activities

# Common Engagement Activities (1)



## Partnering

- **Mapping stakeholders**, their issues & agendas
- Plan & lead on improving **IT/business relationships**
- Regular **partnering meetings** with key stakeholders
- **Relationship improvement planning** with business & IT
- Internal **consultancy** to build **trusted advisor** status
- **Educate IT providers on business** imperatives



## Ambassador

- **Escalation pathway** for the business on IT problems
- Oversight of **service desk incidents & problem mgt**
- Brokering **service level agreements** & SLA reporting
- Reporting **business satisfaction with IT** provision
- Serve as BRM on **project & other governance boards**



## Strategist

- Supporting business developing their **IT road maps**
- Ensure **alignment of IT strategies** with business needs
- IT **demand management** onto projects ingestion



# Common Engagement Activities (2)



## Translator

- Ensuring business understands **service catalogue**
- Explaining IT **provider processes** to business
- Insisting business comply with **standards & policies**
- Promoting **business understanding** of IT architectures
- Influencing on deployment of **new IT capabilities**
- Reframing **frustrations** as opportunities for provider
- Bring business perspective to **IT Senior Mgt Team**



## Analyst

- High level **business analysis & business cases**
- **BA / PM** for small projects & service improvements
- Help manage business **process change**
- Facilitating **project charter & sponsorship**
- Applying **value management** to IT initiatives
- Inputting information to **portfolio management**
- Involvement in **budgeting & funding** processes



# Common Engagement Activities (3)



## Marketer

- Understanding the **maturity of the business** areas
- Understanding the **maturity of the IT areas**
- Influence to **use IT provider** services & capabilities
- Deliver **communications programme** for IT provider
- Create **promotional events** to showcase IT
- Ensure effectiveness of **intranet content** for IT
- Influence changes to the IT **operating model**



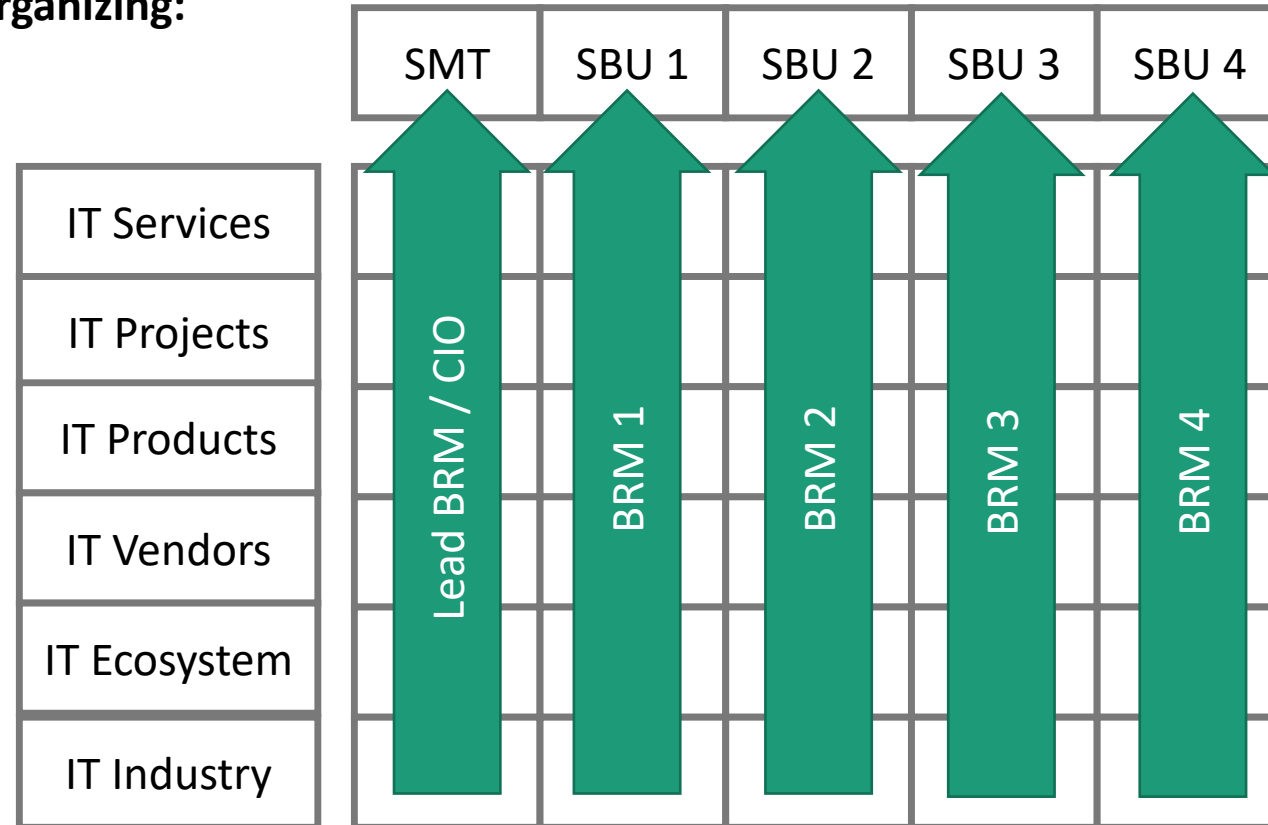
## Innovator

- Explain new tech and **catalyze innovations**
- Orchestration of **ideation & demand shaping**
- PM for **smaller POCs** & other experiments
- **Spreading innovations** around business
- **Publicizing** IT innovations to build capabilities
- Pursuing **recognition & awards** for successes



# Implementing an Engagement Function

**Most common way of organizing:**



But scope, authority, reporting level & clout in IT TOM, level of engagement with BU, maturity allowed, forums invited to, politics, level of resourcing, expected career paths, remuneration, etc. - all vary.



# BRM Function Designs: Three Case Studies

Organisation Type	Design	Activities	SWOT
<b>Global Financial Services Firm with IT Directorate of 1000</b>	<b>“One Team”</b> – engagement teams operating flexibly across all business units	<b>“Innovation Focused”</b> – activities in early stage ideation and demand shaping and dispositioning into IT specialisms	<b>Strength:</b> Initiated many high value projects <b>Weakness:</b> Not involved in many areas that mattered to the business units
<b>Healthcare Provider with IT Division as Separate Profit Centre</b>	<b>“Piggy in the Middle”</b> – BRMs translate business needs into high level requirements and have to sell the decisions made by IT	<b>“High Level Specifications”</b> – mainly restricted to specifying business need then passes to architects who decide yes or no	<b>Strength:</b> Engagement function does not disrupt the power of the IT dept <b>Weakness:</b> IT decide but don’t need to tell business
<b>Government Org with 100 Person IT Department</b>	<b>“Embedded in Business”</b> – Engagement teams are paid by IT but embedded out in the business. Hard to avoid them v us with central IT.	<b>“Negotiating with IT Dept”</b> – Providing as much themselves and dispositioning to central IT when essential	<b>Strength</b> – Engagement teams loved by business <b>Weakness</b> – Goal becomes pleasing the business and conflict common with IT

# (Optional) Buzz Group Exercise 3

## Top Three High Impact Changes



5 minutes

Informal groups of 2 or 3

Q: What if you could change just 2 or 3 things to improve engagement – what would they be?

# (Optional) Exercise Debrief

## Shout Out Your No 1 Change



Examples of really easy things to change?

Examples of hard to do things, but that must happen nevertheless?

αιώνια

**Eonia - Eternity**

The future of IT engagement

# Strategic Engagement is Key to Convergence



Professor Joe Peppard, Principal Scientist,  
MIT Centre for IS Research (CISR), Boston, USA.

“When companies feel they have a problem with IT, the route they typically follow is to restructure IT, replace the CIO with someone with new ideas, maybe appoint digital tsars, or perhaps even look to a third party to run IT for them,”

“But that’s a bit like rearranging the deck chairs on the Titanic.”

“The challenge is not to design a more digitally-savvy IT unit; the question is how to organize the entire firm for success with technology. That’s fundamentally different.”

# Future for IT Strategic Engagement

## Growth in BRM/BP “Movement”



## Maturing the BRM Model

Addressing “failure patterns”:

- “Not reporting into CIO”
- “CIO doesn’t explain the role”
- “Revolving door of CIOs”
- “Lack of CIO praise”
- “Set up to fail” if IT is poor
- “Piggy in the middle”
- “Accountable but no support”
- “Shield for the IT specialists”
- “Used as free resource”
- “Toxic dumping”
- “Overload & burn-out”
- “No budgets for BRM tools”
- “Falls to political action”

## Extension of BRM / BP Model



National level BRMs working with Trust CIOs & BRMs



Building on their success with specialist BRM roles for Info Sec Function



Advocating “Translators” between ML/AI teams & business as a CSF



IT Business Relationship Managers in sales channel digital-enabled firms to grow sales revenues

γνῶσις

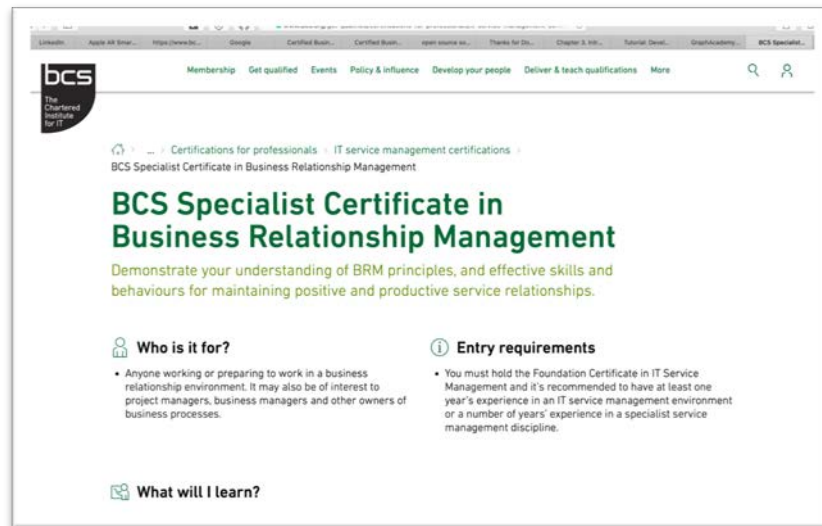
**Gnosis - Knowledge**

Resources for IT strategic engagement



# Certifications

## BCS Specialist Certificate in BRM



<https://www.bcs.org/get-qualified/certifications-for-professionals/it-service-management-certifications/bcs-specialist-certificate-in-business-relationship-management/>

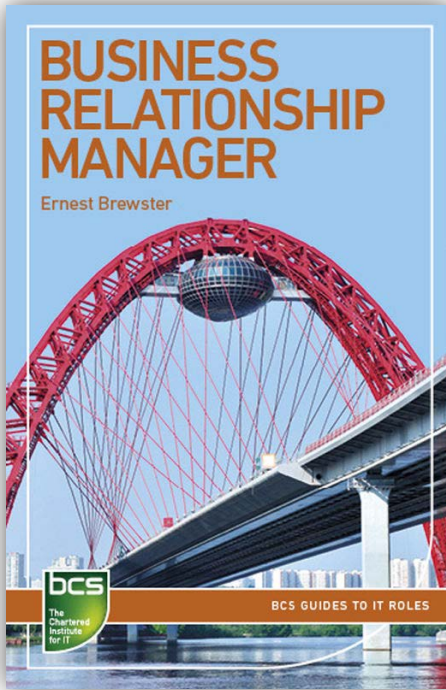
## BRM Institute BRM Professional (BRMP), Certified BRM (CBRM) & Master of BRM (MBRM)



<https://brm.institute/business-relationship-management-knowledge-path-success/>

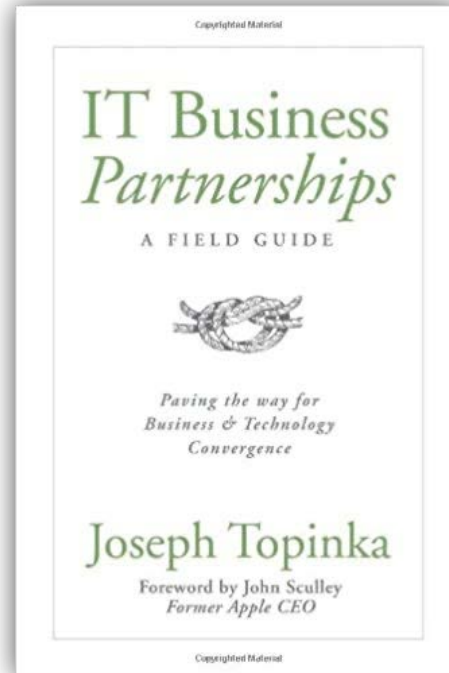


# Books



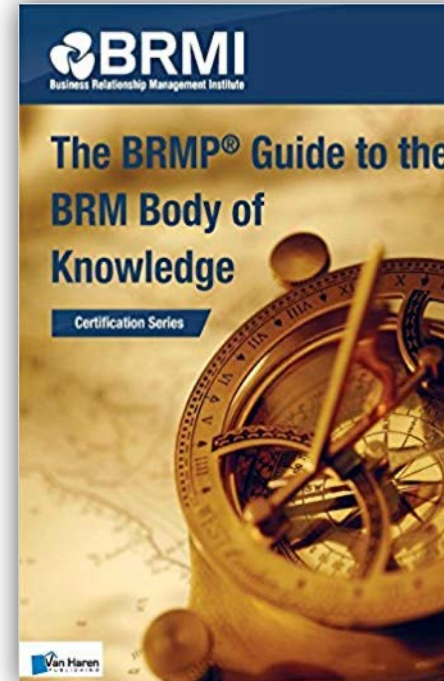
**Business Relationship Manager (BCS) by Ernest Brewster**

<[Amazon link](#)>



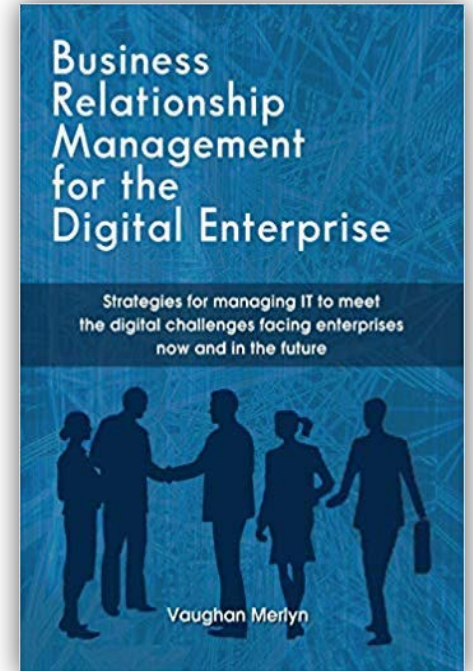
**IT Business Partnerships: A Field Guide by Joseph Topinka**

<[Amazon link](#)>



**The BRMP Guide to the BRM Body of Knowledge by BRMI**

<[Amazon link](#)>



**Business Relationship Management for the Digital Enterprise by Vaughan Merlyn**

<[Amazon link](#)>

# Body of Knowledge

The screenshot displays the BRMiBOK (Business Relationship Management Interactive Body of Knowledge) website. The browser address bar shows the URL: `campus.brm.institute/display/BRMiBOK/The+BRM+Interactive+Body+of+Knowledge`. The website header includes navigation links like "Spaces", "People", "Polls", and "Create". A sidebar on the left lists various BRMiBOK sections such as "Getting Started", "BOK Overview", "BOK Frameworks", "BRM Institute Provider Capability", "Business Relationship Maturity Model", "BRM Competency Model", "Monographs", "Concepts", "Techniques", "Sample Principles", "Sample Core Values", "Roles", "Deliverables", "Metrics", "Publications For Developing BRM", "Glossary", "BOK Guidelines", and "BRMP Syllabus".

The main content area is titled "The BRM Interactive Body of Knowledge" and includes a welcome message: "Welcome to the **Business Relationship Management Interactive Body of Knowledge (BRMiBOK)**. Here you will find a continuously evolving body of frameworks, models, concepts, techniques and information useful to those interested in the Business Relationship Management (BRM) role or organizational capability. The BRMiBOK is available to members of **Business Relationship Management Institute** as a shared resource."

Below the welcome message, there is a "Getting Started" section with a brief introduction: "If this is your first time here, or first time in a long time, take a moment and read the Getting Started page. This will help you understand how to find useful content in the BRMiBOK and how to provide your feedback when you do."

A "New Comments in the BRMiBOK" section lists recent comments from users like Tezcan Vincent, Daniele Alimonti, Regina Marjani, Aaron Barnes, and David Prater.

On the right side, there is a "Content Management" table showing details about the content type, domain, and last update. Below this, a diagram titled "BUSINESS RELATIONSHIP MANAGEMENT" illustrates the evolution of BRM, showing the progression from "Individual" to "Organization" and the resulting "BUSINESS RELATIONSHIP MANAGEMENT" framework, which includes "BUSINESS RELATIONSHIP MANAGEMENT FUNDAMENTALS", "BUSINESS RELATIONSHIP MANAGEMENT PROFESSIONAL", and "BUSINESS RELATIONSHIP MANAGEMENT EXECUTIVE BRIEF". The diagram also mentions "Every step of the way..." and "Certificate of Experience".

Content Management	
Content Type:	Contextual Page
Domain:	BRMiBOK Architecture Domain
Last BRMiBOK Update:	Feb 14, 2019 16:25



# COMMENTS & QUESTIONS

# Discussion during Networking



Tell your strategic engagement / BRM / BP stories – good, bad & ugly 😊

Las Vegas rules please.

Tell Committee members of further support you want from the Consultancy SG on this area?

# Comments and Questions





THANK YOU!





**Metanoia**





# CERTIFICATIONS & SYLABUS

# BCS Certificate in BRM – Syllabus (1)

## 1. Introduction to Business Relationship Management (5%)

- 1.1 The History of ITSM
- 1.2 An introduction to ITSM in general:
  - Candidates should be able to understand:
    - 1.2.1 **Standards**
    - 1.2.2 **Good practice**
    - 1.2.3 **Frameworks** such as ISO/IEC 20000, ITIL® and COBIT® and the differences in approach
- 1.3 The goal and objectives of business relationship management
  - Candidates should be able to understand the requirement for:
    - 1.3.1 **Supplier relationship management**
    - 1.3.2 The roles and responsibilities of the **account manager**
    - 1.3.3 The roles and responsibilities **service delivery manager**
    - 1.3.4 An outline of the related functions, roles and processes

## 2. BRM related processes, based on industry best practices (30%)

- 2.1 BRM concepts and principles:
  - Candidates should be able to understand the requirement for:
    - 2.1.1 The responsibilities and objectives in support of **generic BRM**
    - 2.1.2 The business **value chain**
    - 2.1.3 The approaches to **business/IT alignment**
    - 2.1.4 Understanding the **business viewpoint**
    - 2.1.5 Managing the provision of services
    - 2.1.6 **Supplier relationship management**
    - 2.1.7 Implications of outsourced suppliers

## 2.2 The how - ITIL® and its application to BRM

Candidates should be able to describe the requirement for:

- 2.2.1 The **structure intent and use of ITIL®**
- 2.2.2 The **key BRM guidelines within ITIL®**
- 2.2.3 **Interfaces** with and dependencies on other areas of ITIL® especially service level management, supplier management, service portfolio management, capacity management, request fulfilment and change management

## 2.3 The generic business relationship management process including:

Candidates should be able to explain:

- 2.3.1 Business relationship management – developing **effective working relationships** between the business and IT at strategic, tactical and operational levels using negotiation and communication skills
- 2.3.2 Communicating and **representing business views**, needs, impact and priorities to other IT personnel and processes
- 2.3.3 **High-level requirements analysis and demand management** for identifying and documenting future requirements
- 2.3.4 **Planning, review and development** – continual review and planning of improvements within a business-focused culture in IT, principally at the strategic level
- 2.3.5 **Liaison, education and communication** – coordination and development of knowledge and skills, distribution of information within IT. Principally operating at the tactical and operational levels
- 2.3.6 Ensuring that **customer satisfaction** is surveyed, measured and improved

# BCS Certificate in BRM – Syllabus (2)

## 2.4 The what – the requirements of the **ISO/IEC 20000 standard**:

Candidates should be able to explain the requirements for the proper documentation of:

- 2.4.2 The key BRM requirements of Part 1 of the standard including design and transition of new and changed services, the relationship processes, service level management and service reporting
- 2.4.3 Supporting material from Part 2 of the standard
- 2.4.4 **Risk assessments**
- 2.4.5 The overall **service management system**
- 2.4.6 **Interfaces** with and dependencies on other areas of the standard

## 2.5 On completion of the course the candidate should be able to:

- 2.5.1 Develop and manage **effective relationships** with customers, stakeholders and business managers
- 2.5.2 Analyse, document and communicate **business demand** and **requirements**
- 2.5.3 Develop a **business focussed culture**, throughout IT
- 2.5.4 Measure and record **customer satisfaction**
- 2.5.5 Explain the ISO/IEC 20000 requirements of BRM
- 2.5.6 Support the BRM aspects of an ISO/IEC 20000 certification

## 3. Tools, methods and techniques (5%)

### 3.1 Awareness, knowledge and use of BRM support tools and techniques:

Candidates should be able to explain the approach for using BRM tools:

- 3.1.1 **Generic requirements** for BRM toolsets
- 3.1.2 **Integration** with other areas, processes and functions
- 3.1.3 The benefits of **automation**

### 3.2 On completion of the course the candidate should be able to assist with the:

- 3.2.1 Definition of assessment criteria for choosing appropriate **support tools**
- 3.2.2 Selection of appropriate support tools and techniques
- 3.2.3 Justification, procurement and implementation of such tools

## 4. BRM roles and responsibilities – SFIA and ITIL® (5%)

### 4.1 Skills Framework for the Information Age (SFIA) and its use with defining BRM roles: Candidates should be able to outline:

- 4.1.1 Overview of the structure and content of the **SFIA framework**
- 4.1.2 **BRM roles, levels of responsibility and work activities**

### 4.2 ITIL® and its use in defining BRM roles: Candidates should be able to explain:

- 4.2.1 BRM roles and responsibilities

### 4.3 On completion of the course the candidate should be able to:

- 4.3.1 Apply the SFIA framework to the definition of BRM roles and responsibilities
- 4.3.2 Apply the ITIL® guidelines to the definition of BRM roles and responsibilities

# BCS Certificate in BRM – Syllabus (3)

## 5. Control, measurement and reporting activities (10%)

### 5.1 COBIT® and its application to BRM:

Candidates should be able to describe:

- 5.1.1 The structure intent and use of COBIT®
- 5.1.2 The **key BRM requirements of COBIT® DS1**
- 5.1.3 Interfaces with and dependencies on other areas of COBIT®

### 5.2 The preparation of BRM reports for dissemination:

Candidates should be able to describe:

- 5.2.1 The purpose of **service reports, management reports and reporting**.  
What to report on - and what not to?
- 5.2.2 **Key performance indicators** (KPIs) and **critical success factors** (CSFs)
- 5.2.3 How statistics can be used, and abused
- 5.2.4 Common categories of classification and analysis

### 5.3 On completion of the course:

Candidates should be able to:

- 5.3.1 Describe the BRM reports required and their use
- 5.3.2 Use and apply COBIT® principles and techniques to BRM
- 5.3.3 Describe and explain the **BRM control objectives of COBIT®** and how they could be achieved
- 5.3.4 Produce regular, ad hoc and exception BRM reports
- 5.3.5 Define, measure and report on the metrics and KPIs of BRM
- 5.3.6 Analyse reports and take appropriate action

## 6. Analysis of reports, statistics and trends (15%)

### 6.1 The analysis of reports, statistics and reports, identifying trends:

Candidates should be able to:

- 6.1.1 Identify **areas of weakness and propose resolutions** for the proactive improvement of services

### 6.2 On completion of the course Candidates should be able to:

Candidates should be able to:

- 6.2.1 Analyse details of reports
- 6.2.2 Identify trends
- 6.2.3 **Make use of statistical techniques** e.g. extrapolation, trend-lines, distribution curves
- 6.2.4 **Identify weaknesses** such as linked incidents and initiate corrective actions and changes

## 7. Interfaces and Dependencies (10%)

### 7.1 Areas of Interest will include:

- 7.1.1 Service level management
- 7.1.2 Request fulfilment
- 7.1.3 Problem management
- 7.1.4 Change and release and deployment management
- 7.1.5 Service asset and configuration management
- 7.1.6 IT security management
- 7.1.7 Capacity, availability, finance and continuity principles
- 7.1.8 Project and major changes
- 7.1.9 Supplier management
- 7.1.10 Technical, operations and applications management teams

# BCS Certificate in BRM – Syllabus (4)

## 7.2 On completion of the course:

- 7.2.1 Identify and understand the **interfaces** that BRM has with other areas, functions and processes
- 7.2.2 Define and document the **dependencies** between other areas, functions and processes and BRM
- 7.2.3 Assist with the development, implementation and automation of procedures facilitating interfaces and dependencies

## 8. Planning, improvement and implementation (10%)

(This section of the module will provide an overview of the planning, implementation and **continual improvement** (Plan/Do/Check/Act) **of BRM**)

### 8.1 On completion of the course candidates should be able to:

- 8.1.1 Explain the activities involved in the **planning of BRM**
- 8.1.2 Understand the potential **costs, benefits and problems** associated with the implementation of BRM
- 8.1.3 Know the **objectives and scope** of BRM
- 8.1.4 Review the **functionality of BRM** and the **operation of the BRM processes** identifying areas of weakness
- 8.1.5 Instigate **resolutions and proactive improvements in BRM** within an overall SIP

## 9. Mock Examination (10%)



# BRM Professional (BRMP) Learning Objectives

Holders of the BRM Institute Business Relationship Management Professional (BRMP®) credentials will be able to demonstrate their understanding of:

- The characteristics of the BRM role.
- What it means to perform as a **strategic partner**, contributing to **business strategy formulation** and shaping business demand for the provider's services.
- The use of **Portfolio Management** disciplines and techniques to maximize realized business value.
- **Business Transition Management** and the conditions for successful change programs to minimize value leakage.
- The BRM role in **Service Management** and alignment of services and service levels with business needs.
- The principles of effective and persuasive **communication**.



# BRM Professional (BRMP) Course Content (1)

## BRM Overview

- Be able to explain the **goals and objectives** of the BRM role.
- Understand **why the BRM role is gaining importance** and how it is evolving in response to business and provider forces.
- Explain the concepts of **Business Demand Maturity** and **Provider Supply Maturity** and how these impact the BRM role.
- Understand the **drivers of relationship maturity** and be able to differentiate between tactical and strategic BRM roles and how these relate to order taker, trusted consultant and strategic business partner.
- Be able to explain **common BRM reporting and organizing structures**.

## Strategic Partnering

- Understand **“Demand Shaping”** as a means to increase value realization from provider investments, services and assets.
- Be able to use a Strategic Relationship Management **Process and Tools** to strengthen business partner and provider relationships.
- Understand how and where to **engage in your business partner’s decision cycle**.
- Co-develop, with your business partner, a **Relationship Strategy-on-a-Page** as a mutual Relationship Contract.

## Business IQ

- Understands the industry and its ecosystem
- Understands the business model, business strategy, business processes, and operations
- Understands the organization, roles, politics, and culture
- Understands and applies the disciplines of **Value Management**

## Portfolio Management

- Understand how **Portfolio Management** is the central mechanism for a Value Management Process.
- Understand how to **apply Portfolio Management to the entire life cycle** of provider investments, from managing new investments, optimizing existing investments and retiring old investments.
- Understand the relationships between **Project, Program and Portfolio Management** and how these work together to optimize business value.
- Be familiar with two **common Portfolio Classification schemes** and how they are applied to achieve a Portfolio Balancing.
- Understand how **governance processes and structures** are used in support of Portfolio Management.





# BRM Professional (BRMP) Course Content (2)

## Business Transition Management

- Understand what **Business Transition Management** is, why it is important to BRM, and the components of a **Business Transition Capability Model**.
- Understand how to **create urgency for stakeholders**.
- Understand the **key roles to be orchestrated** for successful business transition.
- Understand key **change leadership** concepts.
- Understand the importance of clarifying the **change details** and typical methods for achieving clarity.
- Understand how the Cliff Analogy illustrates all key factors in managing a transition

## Provider Domain

- Understand the **value-centric definition of a service**.
- Understand the important distinctions between **Products and Services** and the implications for the BRM.
- Understand the different aspects of **service value** and how service provider constraints impact the role of the BRM.

## Powerful Communications

- Understand the components of '**powerful communications**'.
- Understand **how to influence** those over whom they do not have direct control.
- Be able to express themselves through a unique **value proposition**.



# Certified BRM (CBRM) Learning Objectives

The successful candidate will demonstrate deep understanding and ability to perform the Strategic BRM role. Specifically, the candidate will:

- Effectively communicate the **purpose and objectives of the Strategic BRM role** and how to optimally position that role for maximum effectiveness within the enterprise
- Understand how to **use their personal power and influence to build business relationships** and foster a culture that excels at business value results
- **Apply the Strategic Relationship Management processes and techniques** to build and sustain trust relationships spanning Business Partner and Provider networks
- Be able to **assess Business Demand Maturity and Business Relationship Maturity** and how these might evolve over time
- Be able to **assess Provider Capability Maturity and BRM Competencies** and identify key areas needing improvement
- Be able to **apply cross-organization communication techniques** to clearly articulate real Provider/business value delivered to the organization
- Be able to **influence executive leaders in their use of Provider Capabilities and Assets** based upon potential business value and convergence with business strategy
- in the Provider's sphere of influence **promote and catalyze business innovation**
- Be able to **use the Business Value Management process, techniques and metrics** to define, realize and optimize the value of Provider capabilities and assets
- **Apply Business Partner Experience Management** so as to foster a positive Business Partner perception of Provider capabilities as an essential element of building and sustaining trust relationships
- **Shape strategic agendas** for optimum business value, with due consideration of external compliance requirements and potential risks to the business
- Understand the implications of **Lean/Agile methods for the BRM role** and capability
- **Influence the development and deployment of available Provider capabilities** based upon business need and potential to enable or create business value.
- **Apply Business Capability Management** to determine and acquire enabling capabilities pursuant to strategic outcomes
- **Contribute to Business Transition Management** in order to foster organizational understanding, support, adoption, and business value results of investments in new business capabilities



# Certified BRM (CBRM) Course Content

## BRMP Re-cap

- Explain the **House of BRM**, recalling the **BRM Core Disciplines**, competencies required for the BRM role, and necessary conditions for protecting the integrity of the role
- Recall the key **BRM concepts, processes, and techniques**
- Understand the **Business Relationship Maturity Model** and the **Five Relationship Maturity Levels**

## Understanding Business Relationship Maturity and Value

- The Strategic BRM **Role and Capability**
- BRM Impact on **Business Value**
- Intro to the ACME Leisurewear Case Scenario that is used through the course

## Assessing BRM Context

- Clarifying Issues
- Conducting a **Business Demand Maturity Assessment**
- Conducting a **Business Relationship Maturity Assessment**
- Conducting a **Provider Capability Maturity Assessment**
- **Shaping the Business Partner's experience** with the Provider
- The BRM role in **Service Management**

## Developing Strategic Relationships

- How to **assess Strategic Relationships** and **plan** for their improvement.
- How to achieve business impact through **influence and persuasion**.
- How to plan and execute **BRM formal communications**.
- Organizational considerations for **BRM deployment**.
- How to determine appropriate **BRM performance measurement**.

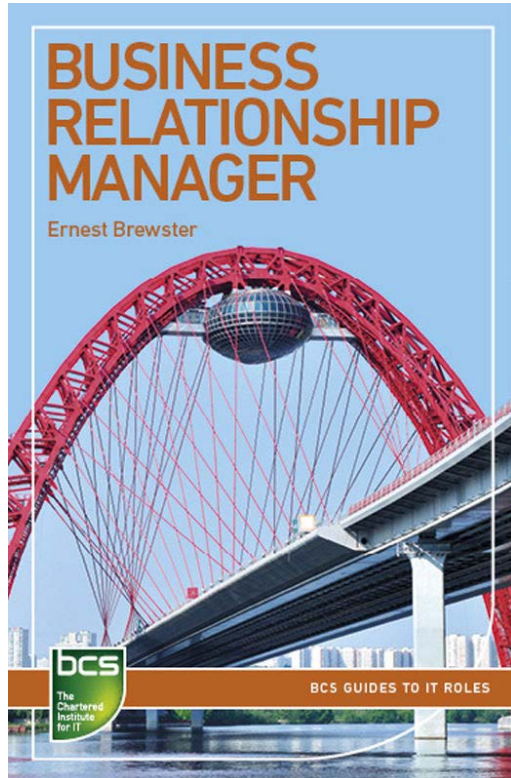
## Optimizing Business Value

- Formulating and Clarifying Business **Strategy**
- Catalyzing Business **Innovation**
- Business **Capability** Management
- **Value Management** Planning
- **Portfolio Management**
- Business **Transition Planning**
- Business **Value Optimization**



# CONTEXTS OF BRM BOOKS

# BRM Reference Book 1



**TITLE:** Business Relationship Manager

**AUTHOR:** Ernest Brewster

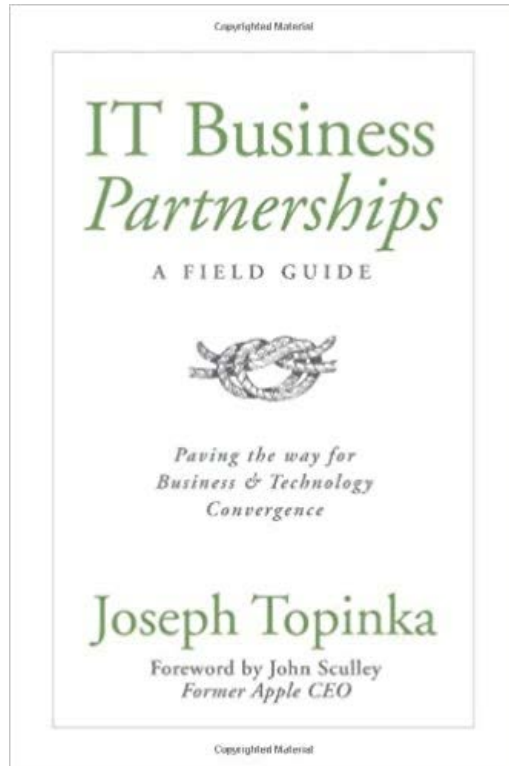
**ISBN:** 978-1-78017-250-7

**Amazon Link:** [https://www.amazon.co.uk/Business-Relationship-Manager-Careers-management-ebook/dp/B00KQITGCY/ref=sr\\_1\\_1?encoding=UTF8&qid=1572077713&refinements=p\\_27%3AErnest+Brewster&s=digital-text&sr=1-1](https://www.amazon.co.uk/Business-Relationship-Manager-Careers-management-ebook/dp/B00KQITGCY/ref=sr_1_1?encoding=UTF8&qid=1572077713&refinements=p_27%3AErnest+Brewster&s=digital-text&sr=1-1)

## CONTENTS:

- Introduction to Business Relationship Management
- The Business Relationship Manager
  - Goals and objectives
  - BRM responsibilities
  - Skills, competencies and knowledge
  - Interfaces and dependencies
- Tools, Methods and Techniques
  - Standards
  - Good practice frameworks, procedures and processes
  - Tools and information
  - Metrics and performance
- Career Progression and Related Roles
  - Origins
  - CPD
  - Career progression – where next?

# BRM Reference Book 2



**TITLE: IT Business Partnerships: A Field Guide: Paving the Way for Business & Technology Convergence**

**AUTHOR: Joseph Topinka**

**ISBN: 0989380904**

**Amazon Link:** [https://www.amazon.co.uk/Business-Partnerships-Paving-Technology-Convergence/dp/0989380904/ref=sr\\_1\\_3?keywords=IT+Business+Partnerships+topinka&qid=1572079894&s=books&sr=1-3](https://www.amazon.co.uk/Business-Partnerships-Paving-Technology-Convergence/dp/0989380904/ref=sr_1_3?keywords=IT+Business+Partnerships+topinka&qid=1572079894&s=books&sr=1-3)

**CONTENTS:**

- Chapter One: Why IT Business Partnerships Matter
  - The Key Functions of an IT Business Partner
  - Overcoming Unhealthy IT Perceptions
  - Getting the Program Right Drives Bottom-Line Results
  - The Pitfalls of Alignment
  - The Roots of the IT Business Partner Program
  - Handoffs Are Not Enough
  - The Power of Business and Technology Convergence
  - Summary: The Road Ahead
- Chapter Two: Legitimizing the Role of IT Business Partner
  - IT Business Partner Strengths
  - Instituting the IT Business Partner Role
  - Summary: Find the Right Candidate and Legitimize the Role

# BRM Reference Book Cont.

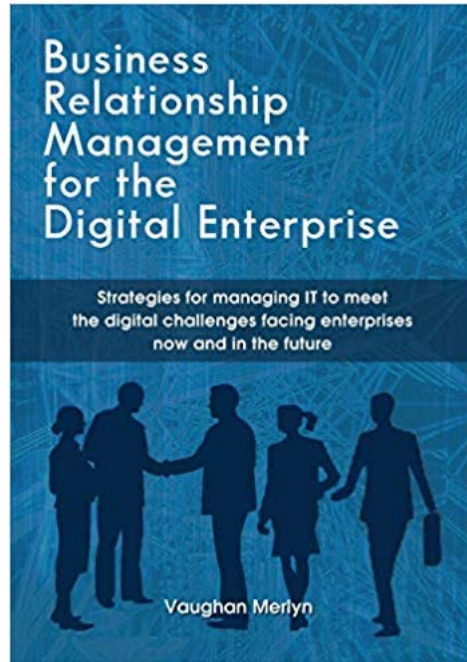
- Chapter Four: Obstacles to Implementing IT Business Partnerships
  - Reliance on Outsourcing
  - Conflicting Roles
  - IT: Its Own Worst Enemy
  - The Only Voice of the Customer is the Customer's Voice
  - Summary: Overcome Your Obstacles
- Chapter Five: Seeing Is Believing: The Importance of Field Research
  - Hide the Technology, Surface the Work
  - Lessons from the Field
  - Summary: Make Field Research Routine
- Chapter Six: Field Research Example: A "Day in the Life"
  - Growth Brings Challenges
  - Quotes from the Field
  - Pictures Tell the Story
  - Summary: Seeing Is Believing
- Chapter Seven: Words Matter: The Power of Language
  - IT Catch Phrases
  - Saying Yes to Projects
  - Changing the "IT Is a Bottomless Pit" Perspective
  - Supply Chain and IT Parallels
  - Summary: Elevate Status and Power with Language
- Chapter Eight: The IT Business Partner's Role in Governance and Strategy
  - Business Investment Governance
  - Investment Stage Gates
  - Size Matters: Tailoring Your Governance Process
  - Operational Projects and Governance
  - Completed Projects: Value Delivered
  - When to Use Policies to Manage the Governance Process
  - Summary: Process Brings Order and Transparency
- Chapter Nine: IT Business Partners and the Project Management Office
  - Determining Areas of Responsibility
  - Building an Intake Process Framework
  - Operational Projects Dominate Time and Attention
  - Quarterly Sprint Tools
  - Summary: Build Trust through Effective Project Intake Management
- Chapter Ten: IT Business Partner Tools
  - Driving Market Value
  - The Capability Plan (a.k.a. The Product Plan)
  - The Release Plan
  - The Capabilities Roadmap Tool
  - Summary: Key IT Business Partnership Tools
- Chapter Eleven: Building a Business Case
  - The Written Business Case
  - The Financial Model
  - Leveraging the Finance Team
  - Pre-selling: An Effective Way to Garner Support and Overcome Obstacles
  - Summary: The Rubber Meets the Road
- Chapter Twelve: Building a Business Case
  - How Does Your Company Make Money?
  - What Does Your Company Value?
  - Summary: Market Insight Matters
- Chapter Thirteen: Managing Inside Your Company
  - Embrace Office Politics
  - IT Business Partners Must Be Visible
  - The Importance of Face Time
  - Summary: Cultivate and Nurture Relationships



# BRM Reference Book Cont.

- Chapter Fourteen: Collaboration and Teams
  - A Model for High-Performing Teams
  - Fight or Flight
  - Self-Assessment
  - Lessons from the World of Improv
  - Summary: Teamwork Equals High Performance
- Chapter Fifteen: Selling IT Internally
  - Idea One: Business Technology Investment Sessions
  - Idea Two: Your Company Intranet and the PMO
  - Idea Three: The Project Condition (PROCON) Model
  - Idea Four: IT Annual Reports
  - Summary: Deliver Value
- Chapter Sixteen: Connecting and Networking
  - Formalize Your Networking Program
  - Leverage Social Media
  - Join Professional Organizations
  - Attend Industry Conferences
  - Capitalize on Personal Networking Opportunities
  - Summary: Stay Connected
- Chapter Seventeen: Hype and the Marketplace
  - Hyper-Changing Markets
  - Journey Mapping
  - Cloud Computing and IT Business Partners
  - Summary: Embrace Change

# BRM Reference Book 3



**TITLE:** Business Relationship Management for the Digital Enterprise

**AUTHOR:** Vaughan Merlyn

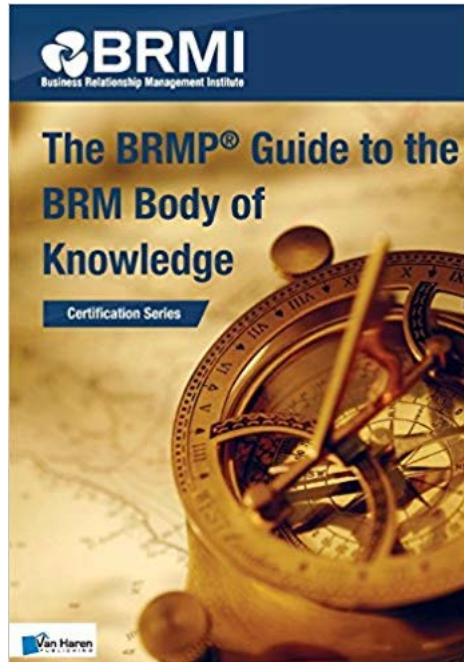
**ISBN:** 0984737383

**Amazon Link:** [https://www.amazon.co.uk/Business-Relationship-Management-Digital-Enterprise/dp/0984737383/ref=sr\\_1\\_13?keywords=business+relationship&qid=1572082045&s=books&sr=1-13](https://www.amazon.co.uk/Business-Relationship-Management-Digital-Enterprise/dp/0984737383/ref=sr_1_13?keywords=business+relationship&qid=1572082045&s=books&sr=1-13)

## CONTENTS:

- Chapter 1      The Shifting IT Landscape
- Chapter 2      Why Business-IT Maturity is So Important
- Chapter 3      IT Leadership for the Digital Business
- Chapter 4      Managing IT in a Digital Enterprise
- Chapter 5      Business Relationship Management: Catalyst for a Digital Revolution
- Chapter 6      Driving Business-IT Convergence Through Business Relations
- Chapter 7      Transforming to a Digital Operating Model
- Chapter 8      Collaborative Change: Finding Order in Chaos

# BRM Refence Book 4



**TITLE:** The BRMP Guide to the BRM Body of Knowledge

**AUTHOR:** BRMI

**ISBN:** 0984737383

**Amazon Link:** [https://www.amazon.co.uk/BRMP®-Guide-BRM-Body-Knowledge/dp/9401800227/ref=sr\\_1\\_15?keywords=business+relationship+management+institute&qid=1572082437&s=books&sr=1-15](https://www.amazon.co.uk/BRMP®-Guide-BRM-Body-Knowledge/dp/9401800227/ref=sr_1_15?keywords=business+relationship+management+institute&qid=1572082437&s=books&sr=1-15)

## CONTENTS:

1. Introduction to the BRM Role
  - 1.1. Terminology
  - 1.2. BRM as a Role, a Discipline and an Organizational Capability
  - 1.3. BRM Metaphors
  - 1.4. BRM-Related Standards
2. Organizational Capability
  - 2.1. Definition of Business Relationship Management
  - 2.2. Capability Model
  - 2.3. BRM Core Disciplines
  - 2.4. House of BRM
  - 2.5. Operating Model
  - 2.6. BRM and the Service Provider
  - 2.7. Business-Provider Maturity Model
  - 2.8. Business Relationship Maturity Model
  - 2.9. Business-Provider Alignment
  - 2.10. Business Partner's Decision Cycle

# BRM Reference Book 4 Cont.

## 4. Service Provisioning

- 4.1. Business-IT Governance
- 4.2. Key Business-IT Governance Domains
- 4.3. Business-IT Governance Illustration
- 4.4. Service Management
- 4.5. Portfolio Management
- 4.6. Portfolios, Programs and Projects
- 4.7. Portfolio Classification
- 4.8. Weill/ Broadbent Classification Scheme
- 4.9. The Boston Square
- 4.10. Portfolio Balancing

## 5. Techniques.

- 5.1. Business Capability Roadmapping
- 5.2. Linking Business Drivers with Technology
- 5.3. Value Management
- 5.4. The Value Management Process
- 5.5. Business Value Leakage
- 5.6. Business Outcomes
- 5.7. Customer Value Hierarchy
- 5.8. Diagnosing Relationship Quality
- 5.9. Relationship Value Mapping technique
- 5.10. Strategic Relationship Management
- 5.11. Repairing Broken Business Partner Relationships
- 5.12. Building the Relationship Strategy on a Page
- 5.13. Building a Relationship Improvement Plan

## 6. Competencies

- 6.1. Business Transition Management
- 6.2. Myths and the realities of Business Transition Management (BTM)
- 6.3. Business Transition Management Capability Model
- 6.4. The Art of Body Language
- 6.5. The Art of Emotional Intelligence
- 6.6. The Art of Listening
- 6.7. The Art of Rhetoric and Persuasion
- 6.8. Influencing and Persuading
- 6.9. Expressing a Unique Value Proposition