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# Supercharging IT and Digital Transformation's Business Value, Success and ROI!

**David Jacobs**

*Chief Value Maximisation Specialist*

*MaxVal Consultancy*

in **DigiGov Expo**

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# **Supercharging IT and Digital Transformation's Business Value, Success and Return on Investment**

**... reducing risk, raising results,  
boosting productivity!**



**DigiGov Expo '24**

**David P Jacobs BSc, MBCS, BVMS**

**25<sup>th</sup> September 2024**

**70% of IT projects and ‘digital’ transformations have partially or completely failed over the last 40 years to meet expectations**

**Welcome to the  
“70% Fail to 70% Succeed!”  
initiative...**



# Why

**has it been 70% fail  
for  
the last 40 years?**

**There's been no specifically value  
focused method for the totality  
(industry disciplines and methods  
are still young)**

# How do we go from 70% fail to 70% succeed?

We can use a holistic, specific and ‘macro-micro connective’ value, success and ROI focused method/approach (framework) that I have developed from a 30-year R&D programme,  
**plus**  
a lot of good collaboration!

## 1970 to 1985

### Marketing Information Analyst & Researcher

1970 to 76 worked in father's advertising agency using numbers

to tell business stories (with sales & marketing research & statistics)

1973 to 76 gained BSc Hons in Management Science at Warwick University

included Marketing Research and Computing (in Algol 60 on IBM punched cards!)

1979 to 85 Marketing Information Consultant to the UK air cargo industry

## 1981 to 1997

### Computer Programmer, Analyst & Business/IT Hybrid/Mediator

1980s started business/IT gap bridging to maximise business success

1993 started to develop Business Value Maximisation Framework (BVMF<sup>®</sup>)

1995 my first article published in Corporate IT Strategy

## 1997 to 2024

(Senior) Business Analyst (BA),

Business Value Maximisation Specialist (BVMS),

Project Success Adviser

& Author, Mentor/Coach

1999 prior to 2000, I'd created 65% of BVMF<sup>®</sup>

2001 when David Taylor called for a "whole new approach", I said "I've been working on one for over a decade!"

# First Question

**If I want maximum business value (MBV)  
from my IT, 'digital transformation', BAU  
and CI related endeavours  
for my stakeholders/value interested  
parties (VIPs)**

**what do I need to focus on, think about,  
and, most importantly, do...  
practically and pragmatically?!**

**Note: it's not to ask: 'What flavour of agile shall we use?!'**

# Next Questions

- **What is value?**
- **How does value arise?**
- **Where will the value come from?**
- **How much value is there to be had?**
- **What are the elements that need to be combined (the value cake's ingredients)?**
- **How best/optimally to combine the elements/ingredients?**
- **How do we get more value?**
- **How do we avoid getting less value?**
- **How do we measure/quantify value?**



# Further Questions

**When running a project we need to ask:**

**BEFORE:**

**Will we be better off?**

**By how much will we be better off?**

**What's the likely net gain (value)?**

**AFTER:**

**Did we get the likely net gain?**

**How do we ensure we'll be the best off possible (across time)?**

**How do we stay being the best off possible?**

# The Challenge

**We need to be**  
**very aware/cognisant**  
**of the challenge/s**  
**we're dealing with...**

# The need to complete, integrate and focus a variety of methods and disciplines

**For Optimal  
Value, Success, ROI**

**Projects, CI, BAU, Dig Transf.**

**IT Service Mngmnt**

**Interviewing, stakeholder  
mngment, reqs defn, etc**

**MSP, MoV, Bens Real.  
Mngmnt, etc**

**IT Dvt – agile, wagile, waterfall, Scrum, Safe, etc**

**Change Mngmnt, Org Design,  
cultural ‘happiness’...**

**Project Mngmt: Prince2,  
PMBOK, etc**

**Other methods, disciplines,  
aspects, factors, elements...**

**Project/programme/  
portfolio management,  
business analysis,  
process dvt, IT dvt,  
test, roll-out, user/client  
support, etc**

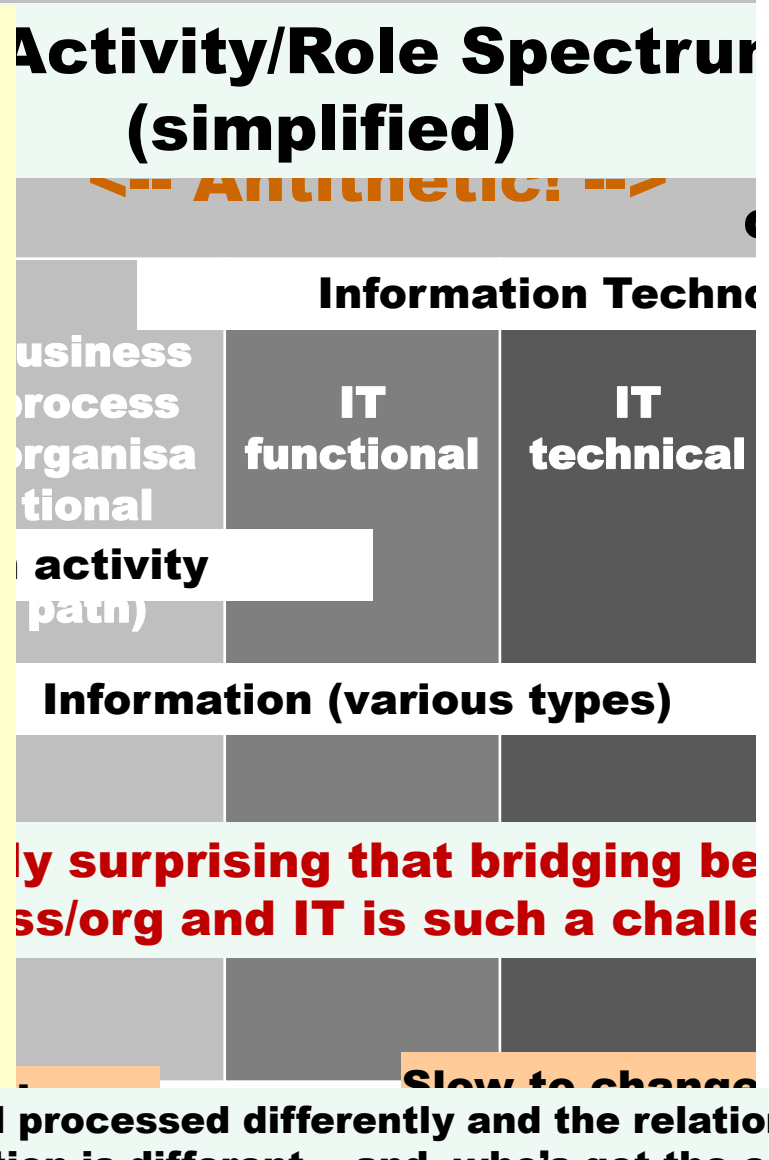
# The Mighty Cruel Ratio

**There are (very) many ways  
to get this wrong, and only a  
few ways to get it right;  
sometimes only one!**

**David P Jacobs, 2022**

# 'Bridging the Gap'

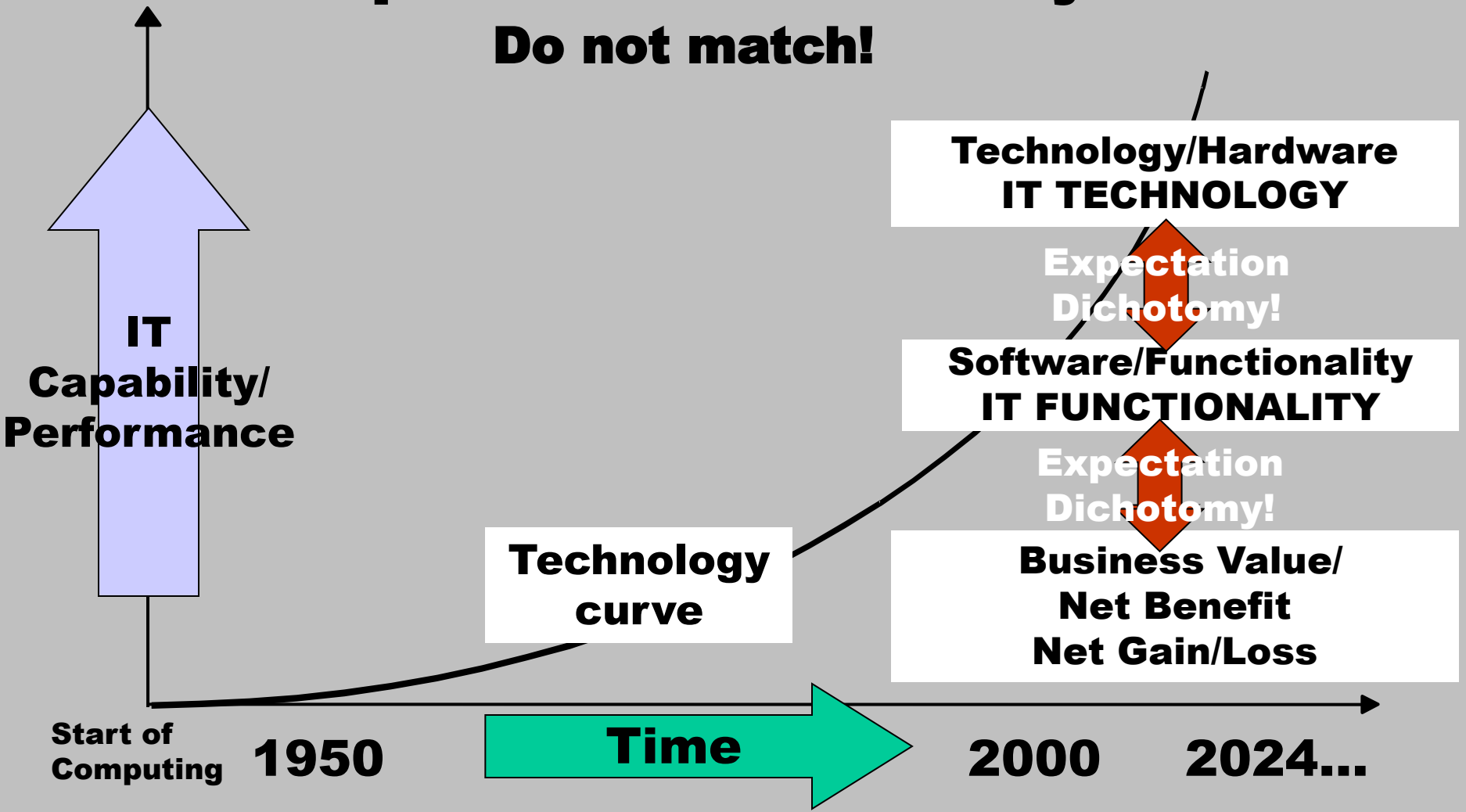
**Humanly 'logical/rational, emotional', conscious, creative, insightful, flawed, error prone, sees and creates the future, data stored as multidimensional neuro brain pulses of infinite complexity and nuance, storage space is infinite. 10 billion years old as neolithic to homo sapiens, etc with infinitely creative, insightful consciousness, not restricted to repeatable patterns, Data/info is stored and processed differently and the relationship between data/info and process/function is different... and, who's got the control at run-time?!**



**Arbitrary, artificial, IT logic(al), mechanical, copies repeatable patterns programmed by humans, no genuine consciousness, extrapolates, sees backwards, data stored as 1s and 0s, accuracy depends on the Representivity Factor (Repr-F), is a simulation, storage space is finite. 150 (?) years old as analogue, digital, quantum... has simulated 'consciousness', learns mechanically, no emotions, copies, does not create but original thought**

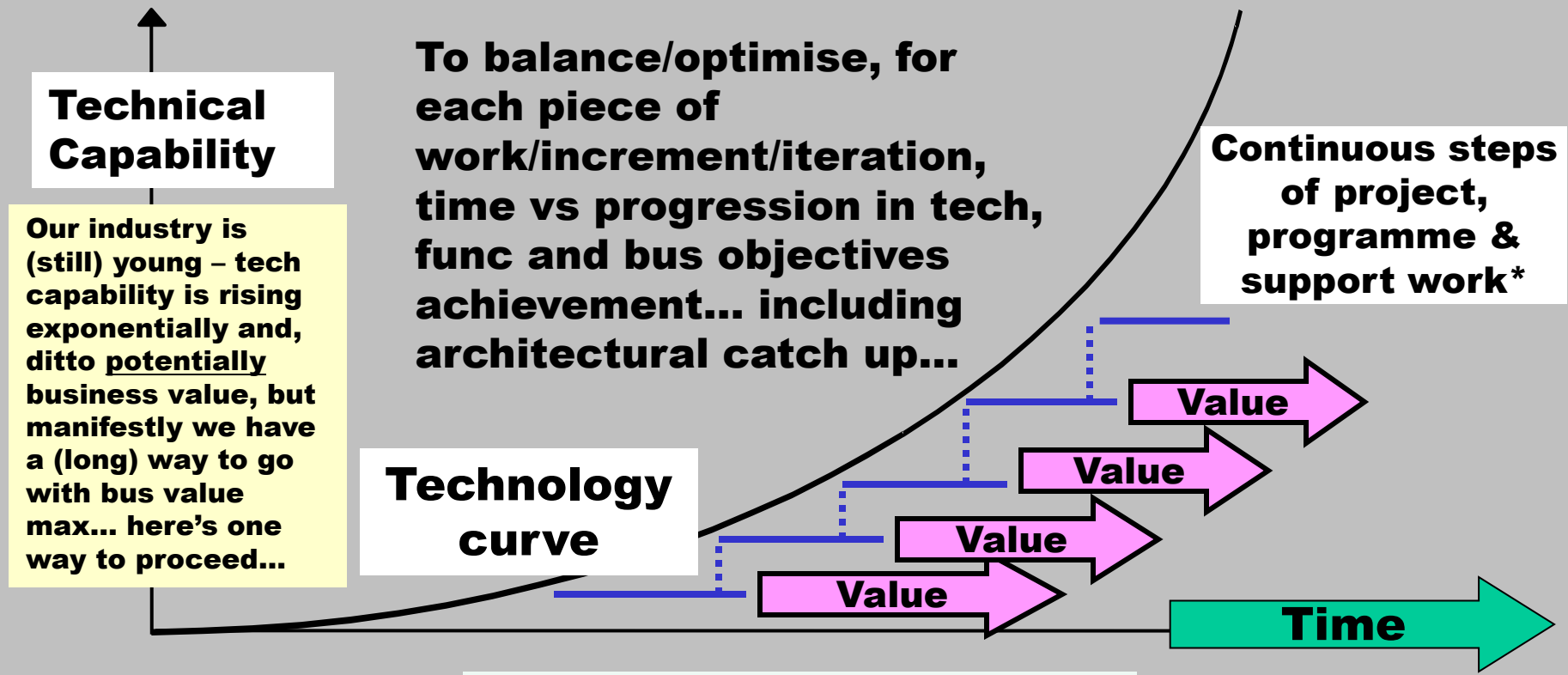
# Expectations and Reality

**Do not match!**



## The 1934 Model

# To optimise value against (high) expectations and to hit the moving target, we need to cut steps into the Technology capability (growth) curve



## The Step Diagram

This helps you optimise your efforts against a moving target...

\* A celluloid film's 24 frames a second looks like seamless moving pictures...!

**To go from 70% fail  
to 70% succeed ...**

**we will really have to work  
together...**





# Let's remember ...

**People thought the earth was flat  
(some still do)  
*and* that smoking was good for you!**

**Here are more quotes:**

**1899 “Everything that could be invented has  
been invented...”**

**1943 “The world market for computers is  
about five...”**

**1977 “Nobody would want a computer in  
their home...”**

**The last two quotes were from heads of leading  
computer companies!! (IBM and DEC)**

# Ok, let's start to rock 'n' roll ... !



# What is Value? (VDefnM)

**The achievement/meeting of  
business/organisational goals, objectives and  
expectations of stakeholders/value interested  
parties (\*VIPs)**

**plus**

**Value is achievement  
against objectives**

**the exceedance\*\* of business/organisational  
goals, objectives and expectations of  
stakeholders/value interested parties (VIPs)**

**\* includes all parties affected, involved in any way;  
their positions reconciled for optimal net benefit**

**\*\* we want to maximise the harder to predict/implicit/harder to identify value as well as the  
easier to predict value/explicit/easier to identify value**

**It's not easy to predict all value as it accrues (or gets wasted) at micro level – ‘business  
cases’ have tended to be “macro-assumptive” and bounded/limited ... we're shooting a  
moving target**

**Value is net benefit – all tangible and less tangible costs and benefits must be factored  
in/weighed up - it is possible to ‘equate’ the two**

# How Value Arises run-time, auto-assisted

**Business value, success, ROI  
 BVSR**

**\* Achieves/exceeds  
 business/project  
 objectives**

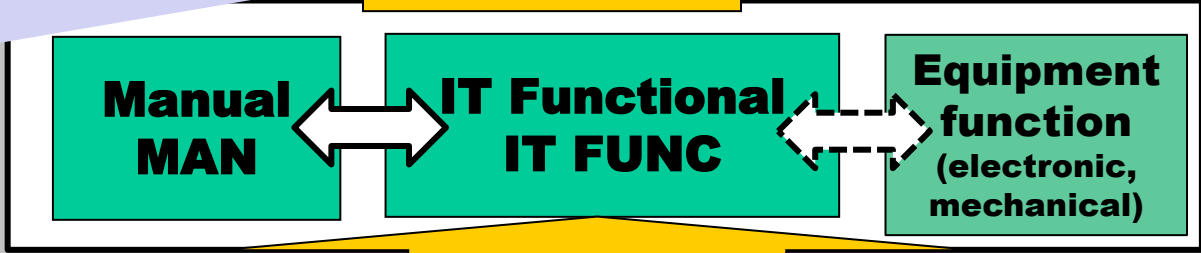
**Delivers**

**Bus process/operational capability path**

The BP/OAP(-IT)  
 part of this  
 process can only  
 be what it is  
 because of the IT  
 enablement

**Value Delivery Model  
 (VDM)**

**Enacts**



This includes  
 auto-  
 assistance at  
 various levels  
 by software  
 and fully  
 'automated'  
 processes

This includes  
 'pure' BP/OAP  
 which is not  
 auto-assisted  
 and BP/OAP (IT)  
 which is

This includes  
 'pure' human  
 activity not  
 associated with  
 the IT system but  
 may be auto-  
 simulated ...  
 MAN Pure  
 MAN/IT, and  
 (mechanical)  
 equipment  
 function

**Enables**

**IT Technical  
 IT TECH**

**Where will our value come from?**

**What will the 'ingredients' be?**

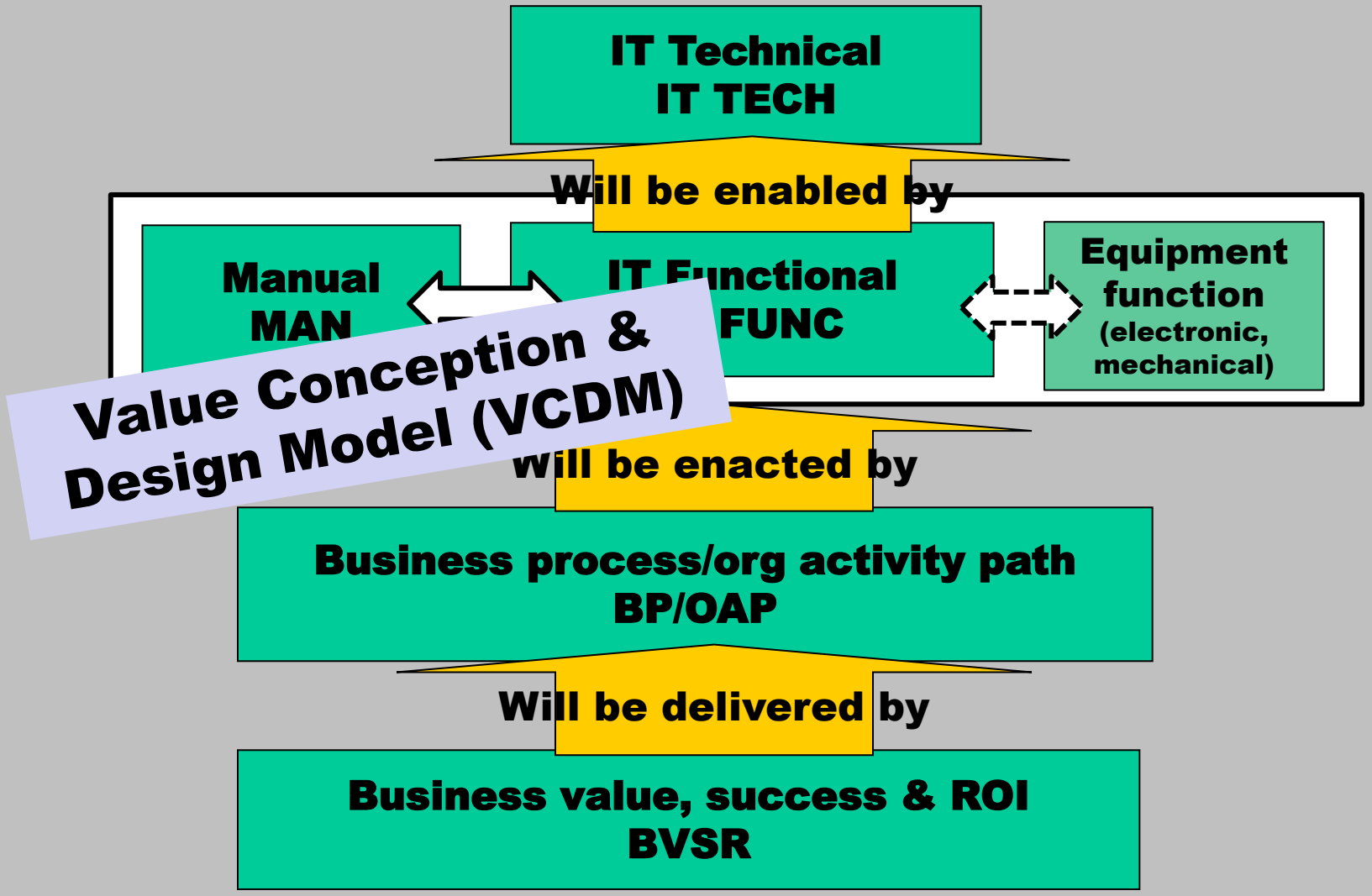
**How much value can we get from each 'ingredient', i.e. what's the Propensity?\***

<u>Ingredient Description</u>	<u>Ingredient Name</u>	<u>% of Total Value to be Realised*</u>
<b>Business process/org activity path (incl. creation and use of information INFO)</b>	<b>BP/OAP</b>	<b>25?</b>
<b>Human activities</b>		<b>10?</b>
		<b>10?</b>
<b>IT functionality</b>	<b>IT FUNC</b>	<b>25?</b>
<b>IT technicality/technology</b>	<b>IT TECH</b>	<b>10?</b>
<b>Morale, PR, image, reputation, goodwill, perception, kudos, prestige, motivation (less tangible)</b>	<b>MISC</b>	<b>5?</b>
<b>Cost (£s absolute/reduction delta)</b>	<b>COST</b>	<b>15?</b>

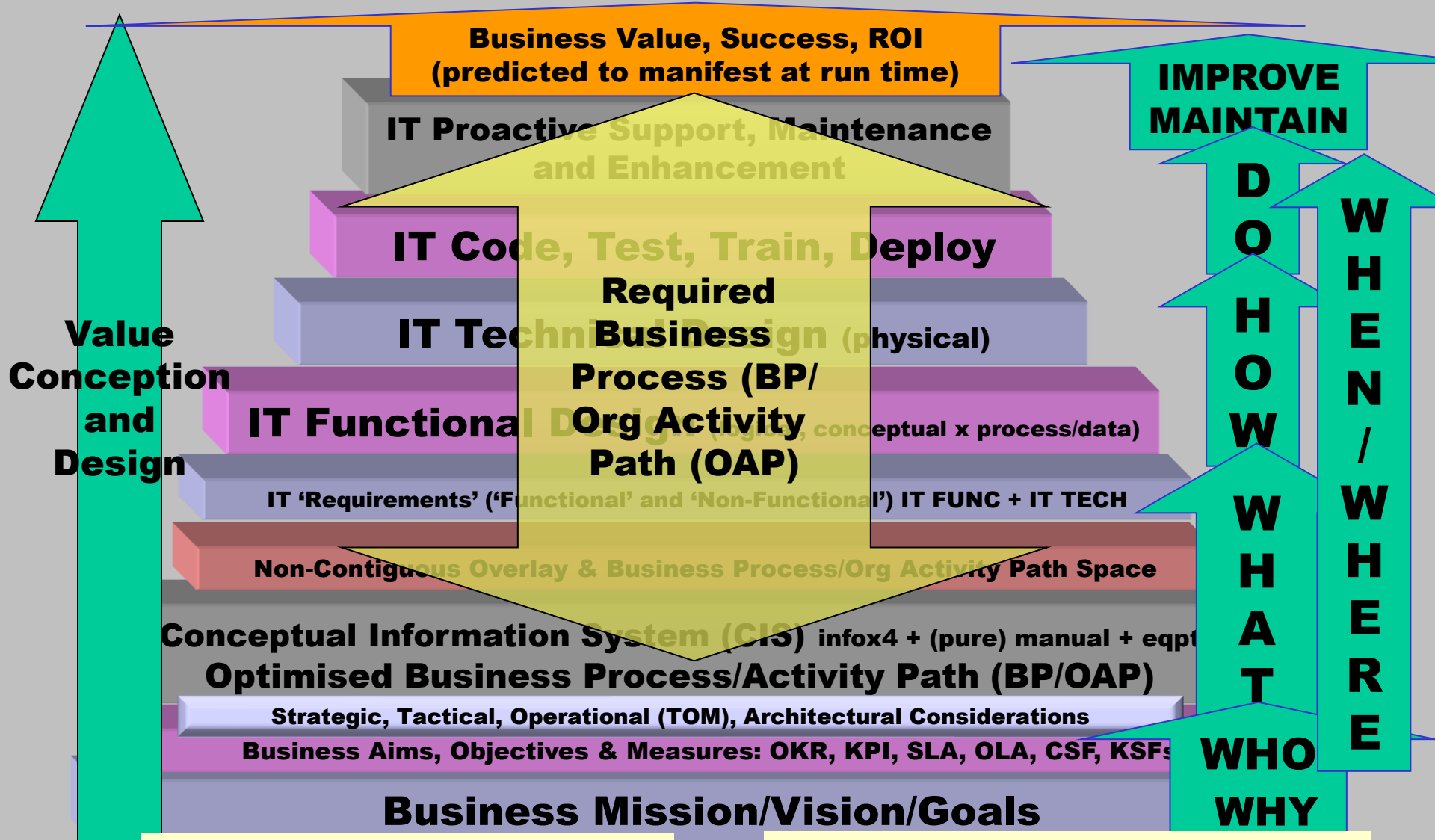
**Origins of Value, 'Ingredients' and Propensity**

\* These value ingredients are not necessarily mutually exclusive; it depends how you look at them... also we must factor in mechanical equipment's (non-IT'd) functionality ... and risk (RISK) ...

# How Value is Conceived and Designed design time, auto-assisted



# Value Conception, Design & Delivery Layers of Focus (LoF)



Thanks are due here to A Maslow, R Wallsgrove, Cranfield University and most brides and grooms...

Along with this value conception layer cake, chain links and jigsaw pieces apply...

**Peter Drucker said,  
“You can only manage  
what you can measure”.**

**This is broadly true; and/but  
you can maximise each  
successive tranche of ‘tricky  
to measure’ value using  
comparatives and sensible  
measurement ‘handles’...**

**BVMF<sup>®</sup>, and this  
whole way of  
thinking, works  
by defining and  
identifying,  
assessing/  
forecasting,  
tracking,  
monitoring,  
boosting and  
continuing to  
boost value,  
success and  
ROI as the  
primary activity**



# The Business Value Equation (1 of N)

How much better off do we expect to be?

Running the equation to optimise outcome/results:

**Net Business Gain (or Loss)**  
**tends to be proportional to**  
**the Performance of the**  
**Reengineered/Reviewed Business**  
**Process/Org Activity Path**  
**as helped (or hindered) by the**  
**IT Functionality**  
**as supported (or degraded) by the**  
**IT Technicality (the technology)**  
**plus (or minus) a Miscellaneous element of**  
**image, morale, reputation, etc...**  
**...all subject to Cost (incl. risk)**

# Examples of the Power

**BVMF<sup>®</sup> started as high-grade business-IT mediation in the 1980s, became multifaceted in the '90s and relentlessly value focused. Now honed over three decades, here are two value deliveries it's made:**

## **Telco Billing Upgrade cultural problem - fixed.**

**The billing mgr, disappointed in her IT dept was unhelpful, even cantankerous. I used a BVMF approach to win her over. Then she said, "Your [value-based] approach is a breath of fresh air" and the Proj Mgr said "There have been no hitches in this implementation, that's almost unheard of here!"**

## **University Registry-IT dept stand-off - fixed.**

**On an auto allocation process & system for staff and students' electronic svcs, I used BVMF models to identify and show the problem. This helped the warring parties to collaborate. We then produced a bus process flow to guide derivation of system reqs, IT wrote the fixes, upgrade was implemented, all were delighted, problem solved.**

# What They Say About BVMF<sup>®</sup>

**“BVMF is extreme common sense;  
I wish I’d known about it years ago...”**

**Principal Business Analyst  
Large entertainment corporation, 2022**

**Now a successful consultant business analyst,  
trained and accredited in BVMF<sup>®</sup> at Foundation  
level as a Business Value Maximisation Specialist  
(BVMS)**

**More testimonials are on the  
MaxVal web site**

# A Parting Thought

**What is your top challenge in respect of maximising business value, success and ROI from IT and 'Digital' Transformation?**

**Visit our business value maximisation clinic at stand B3, tell us your challenge/s and we will start helping you straight away!**

**We're running this clinic again on Nov 5<sup>th</sup> and 6<sup>th</sup> at Government Transformation Week (GTW)**



# Thank you for listening!

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**Web [www.Maximum-Value.co.uk](http://www.Maximum-Value.co.uk)**  
**[www.DoITBetterConsortium.co.uk](http://www.DoITBetterConsortium.co.uk)**

**Lots more information is on the MaxVal website: links to articles, podcast, webinars, slides, videos, etc.**

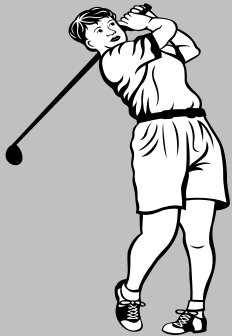
# Addendum



# Maxims

**The holistic IT and 'Digital' Transform value jigsaws have pieces missing or not fitting together properly**

**A set of golf clubs is not the primary determinant for the golfer to win the match/tournament; we need to work holistically, on the totality**



**You would not drive your car all the way to work in reverse (although occasionally reverse gear *is* valid); the car is not the journey! So, we measure and work like Archimedes (from the BP/OAP)**



**You can't bake a great cake without knowing what kind of cake is required and why, what the ingredients need to be and how to mix, cook and serve the ingredients, optimally!**



# MaxVal Services and BVMF®

## Further information, help and resources

Item	Type of Item/Short Description	Resources/Information Provided
<b>CURRENT</b>		
MaxVal web site	MaxVal Consultancy's website for BVMF® is at <a href="http://www.Maximum-Value.co.uk">www.Maximum-Value.co.uk</a>	The story of BVMF® and MaxVal Consultancy's development with plenty of background, etc. <b>The home page's Latest News feed has links to most of the resources listed below!</b>
IIBA UK web site	Webinars – promotional narrative, slides and recordings. <b>An excellent introduction to BVMF® across four successive webinars</b>	Webinars listed on the IIBA UK Past Events tab/page: July 2020 (1), September 2022 (2), August 2023 (3), January 2024 (4) <b>The recordings for webinars 2 thru 4 are temporarily unavailable. However, pdfs of the slides are there for all four webinars. The promo pages and the three missing recordings will soon be back up.</b>
Spotify podcast	Podcast under The Independent Minds (Michael Millward's)	Podcast for business leaders on IT business value maximisation (a 20+ mins listen)
Brainz online magazine web site	Articles, online, with an entrepreneurial, successful leadership coaching and mentoring orientation, for optimal personal and professional performance including David Jacobs' journey with the development of BVMF®	A series of 3 articles entitled 'Riding the Storm of Scepticism and Apathy for Entrepreneurs, Inventors and Pioneers', an interview with David P J and a Special Report on the project failure rate of the last 40 years of 70%
Open Access Government (OAG) online web site	Online publications for civil service, public and governmental organisations	Stakeholder article on MaxVal's services with a profile of CEO/BVMS David P Jacobs. Articles on the Holy Grail of business IT, The Golden Value Circle (parts 1 and 2), a Special Report on the 70% project failure rate of the last 40 years and an article on the Value Delivery Model (VDM) <sup>TM</sup> from October 2024
Do IT Better Consortium (DIBC) web site	Subsidiary website of MaxVal. DIBC was founded by David P J in 2014.	Description of the type of consultancy services client organisations need; all member consultants are BVMF® trained or in the process of being trained
<b>FUTURE</b>		
IIBA UK web site	Webinars "A Closer Look at The Elephant" Parts III and IV	Part III is scheduled for late autumn 2024, date tbc. Part IV will be early in 2025.
Open Access Gov't	Online in October 2024 issue	Article on use of the Value Delivery Model (VDM) <sup>TM</sup>
Government Transformation Week (GTW)	November 5 <sup>th</sup> and 6 <sup>th</sup> at the Intercontinental hotel at the O2, MaxVal will run its IT Business Value Maximisation Clinic and David will be presenting	David will present on the Holy Grail of business IT, i.e. how possible and feasible it is to get much higher levels of value, success and ROI...
Commonwealth 75 Anniversary	Event in Westminster on October 9 <sup>th</sup> along with a promotional book featuring MaxVal, BVMF® and David Jacobs' comments on IT and digital transformation related value, success and ROI maximisation	Celebrating the Commonwealth 75 anniversary, MaxVal appears in a new book out in October 2024. We will be attending the event in Westminster with commonwealth leaders to talk about IT, digital transformation best value-related practices



# More Models, Modules & Meta-models of approximately 100...

Name	Function
<b>The Conceptual Units of Benefit (CUB) Ladder</b>	<b>Allows value-based dependencies of any project artefact (and related tasks) to be optimally aligned/stacked up. This will hugely enhance any MoSCoW prioritisation mechanism being used.</b>
<b>Football Team Management (FTM)/Optimal Human-Computer Interaction (OH-CI) and Micro level value loss avoidance</b>	<b>A fundamental way to combine humans and computers deeply that yields an optimally powerful and effective team to enact the business process (BP)/org activity pattern (OAP)</b>
<b>Business Practice and Contingency (BP&amp;C)</b>	<b>Makes sure, at Run time, all the hard work pays off, i.e. that IT systems do not degrade business processes rather than enhancing them! It's very easy to ruin a business with IT that doesn't work...</b>
<b>Crossword Diagram</b>	<b>Decomposition style analysis of predicted (design-time) and manifest (run-time) value/success that's supports you in divining where the IT systems are better than they were and where they are not so you can fix and/or improv them. A great way to structure and progress CI.</b>
<b>Two Node Factors and related spectrums such as Push/Pull (P/P), Macro/Micro, On-point/Incremental, Explicit/implicit value, etc.</b>	<b>There are plenty of two node concepts in BVMF® and here we look at the main ones. Macro-&gt;Micro, Design time-&gt;Run time, Functional-&gt;Technical, Estimated-&gt; Actual, etc. Also, some techniques for effective analysis and communication.</b>
<b>The IT Business Value Capability Assessment (ITBVCA)<sup>TM</sup> – a BVMF® meta-model</b>	<b>Using the IT Effectiveness Spectrum<sup>TM</sup>'s criteria set to assess IT Business Value Capability (ITBVC), in order to improve it, this is for the systematic assessment of value maximisation capability and maturity.</b>
<b>Layers of Focus<sup>TM</sup> sub-layers</b>	<b>Detail on key sub layers that have not previously been delineated by other methods</b>
<b>Approach to effective value analysis: the Six Factor Cadence</b>	<b>Good for BAs, PMs and BVMSs, shows logical linkages and common misconceptions between the factors; mentioned in one of David Jacobs' Brainz articles. Covers why, what, how, who, when, where.</b>
<b>Landscape Value Characteristics (LVCs)</b>	<b>A comprehensive set of criteria that help determine the best approach across the waterfall-wagile/hybrid-agile spectrum for any given piece of work or project</b>

Name	Function
<b>Representivity Factor (Repr-F)<sup>TM</sup></b>	<b>Tracks the correspondence/alignment between real world process and data and how appropriately/accurately they are represented in an IT system</b>
<b>Predefinition, currency/changeability and control (P, C/C &amp; C)</b>	<b>Degree of control a user has within a given time scale, including immediacy of mutual communication (IOMC)</b>
<b>Sole working vs team sizes</b>	<b>Optimisation of the balance between the single mind and larger teams (some Croydon Facelift q.v. will be useful here)</b>
<b>Information Systems Business Value (ISBV) gross and net – a measure of the boost that IT FUNC gives to BP/OAP</b>	<b>A variable used by the Business Value Equation (BVEq)<sup>TM</sup>, this measures Information Systems Business Value (ISBV) by gross and net. It's easy for the combination of IT FUNC and IT TECH to <u>degrade</u> a business process's performance rather than improve it! This helps to keep track of what's actually happening at run-time</b>
<b>Assess, Boost, Check (ABC)</b>	<b>A way to boost value when it threatens to falter; works in conjunction with Crossword Diagram...</b>
<b>Functional Creativity</b>	<b>To help the business community to envisage required IT functionality; a bit like blue sky thinking</b>
<b>Taking the Rap</b>	<b>A 'mantra' to help business managers avoid surreptitious inclusion of certain work practices into new systems with negative consequences</b>
<b>Value focused 'requirements' definition</b>	<b>To develop atomic, value focused 'requirements' for each value element and ingredient bearing in mind IT 'reqs' are NOT the only kind we need!</b>
<b>Specific terminology definitions</b>	<b>We yield more value from accurate terms definition with glossaries that equate business, process, value and IT terminology</b>
<b>The Croydon Facelift</b>	<b>A powerful set of techniques for working in an optimal way with one or more others, to get to a result quickly and valuably. Optimised way to communicate with users, senior SMEs and other involved parties making analysis and meetings far more value effective.</b>
<b>Archery Target</b>	<b>Visual career progression model and tool, good for business analysts, project managers, IT professionals, seconded SMEs and all roles involved</b>



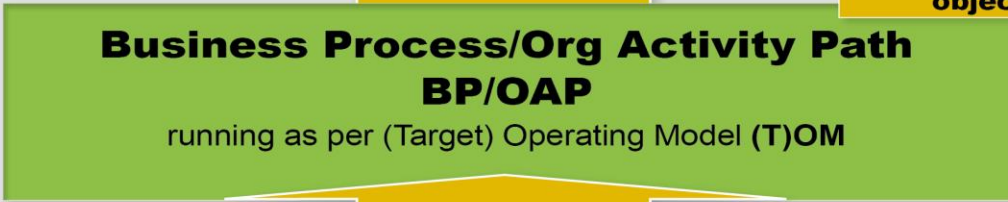
**Value Delivery Model (VDM)<sup>™</sup>**  
shows value arising in the operational situation



This simple run time model has a design time equivalent called the Value Conception and Design Model (VCDM)<sup>™</sup>.  
  
The VCDM, in turn, has a more detailed version of the layers of focus needed for optimal design in the holistic scenario; that model is called Layers of Focus (LoF)<sup>™</sup>.



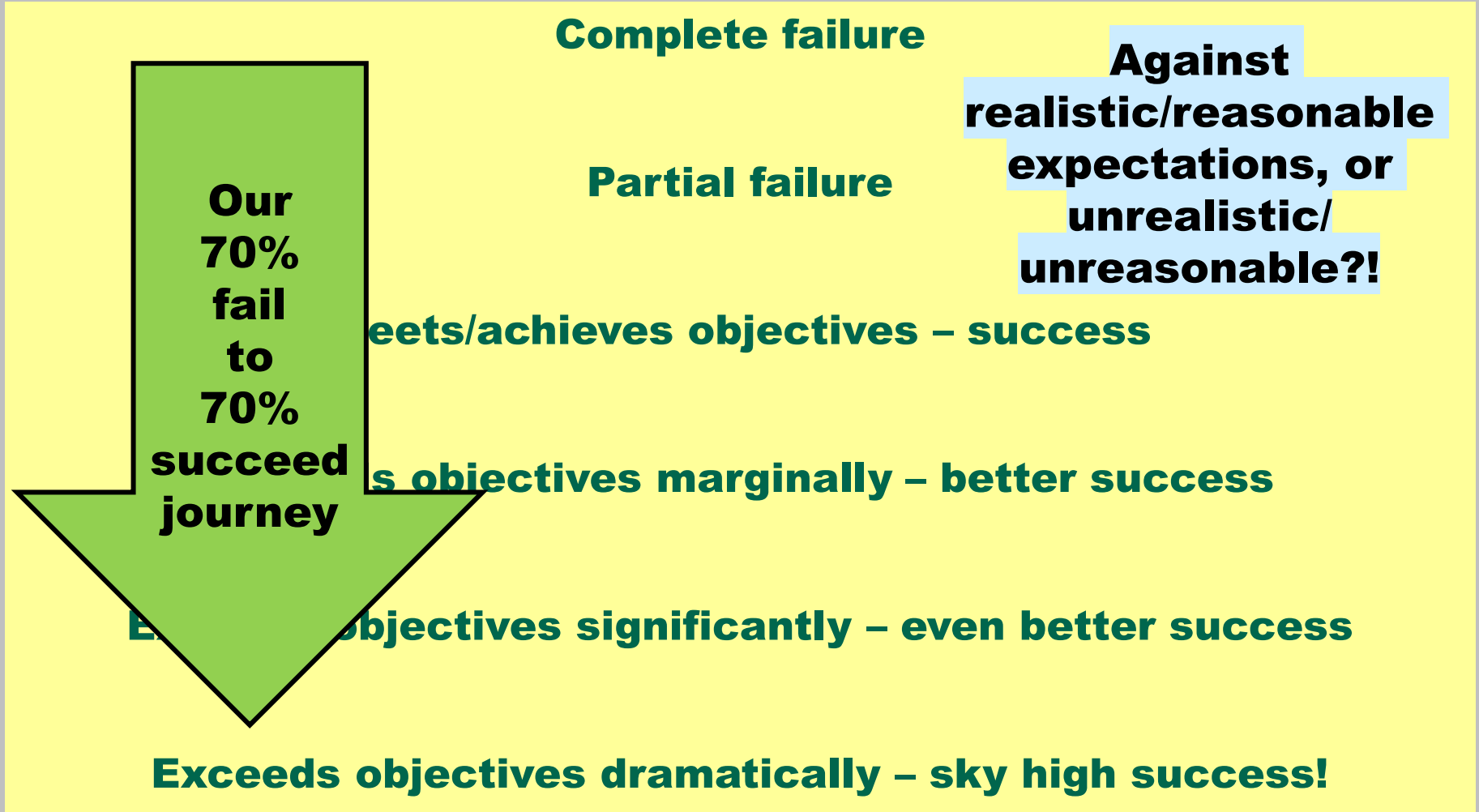
**\* Achieves/exceeds business/project objectives**



Further elements of value, Miscellaneous and Cost/s for example, variables in the Business Value Equation (BVEq)<sup>™</sup>, are not shown explicitly in this version of the VDM.

Types of value encapsulated in the VDM are separated along a spectrum of negative, zero, enabler, Herzberg hygiene, low, medium and high positive in the Conceptual Units of Benefit (CUB)<sup>™</sup> ladder.

# Levels of Result (VDefnSubM)

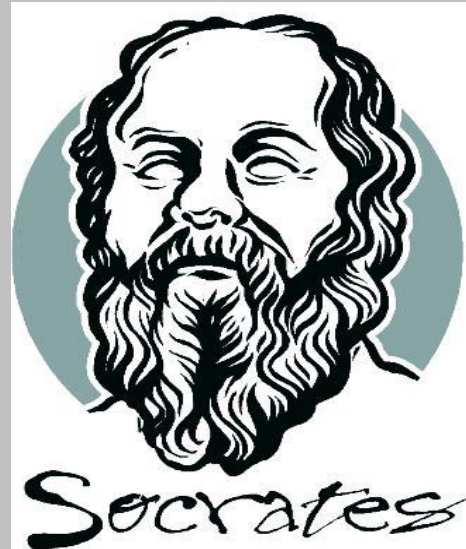


# The Exponential Iceberg of Resource and Complexity

**against ever rising  
(un/realistic?) expectations!**



**Right, so, with thinking caps on...**



**... factoring in empirical observation, hypotheses, Aristotelian syllogism, bits of Socratic Questioning, some basic philosophical logic and a fair bit of trial and error ... along with 30 years of first, second and third hand experience and some very good project results along the way, here we go...**

**Socrates and Galileo had a very bad time trying to tell the truth!**

**We'll have to be confident and resolute, to challenge conventional 'wisdom'; NOT to follow the crowd in order to be **insightfully** and **positively disruptive** ...**

