

Chapter 5

The Challenge of a Corporate Matchmaker

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ABSTRACT

The common structured procurement process of the Request for Information (RFI), Request for Proposal (RFP), and Business Case Development (BCD) is thought to establish ties with the right vendors and to strengthen relationships among other stakeholders. This single-case study gathered information through archival documents, observations, and in-depth interviews and examined whether RFI-RFP-BCP processes fostered favourable relationships with vendors. The study revealed certain disadvantages of the process.

“All change is not growth; as all movement is not forward.” - Ellen Glasgow

BACKGROUND

Right after the University of Australasia (name disguised) determined its vision to be a “research-led University with an international reputation for excellence, it also made a commitment to invest in three things: capability, human resources, and in-

formation technology. Its current enterprise system, in particular, was in need of a major overhaul. The university’s gatekeepers understood that the only way to achieve their vision would be to introduce new enterprise systems as soon as possible.

This case study examines the process by which this new system was introduced and finally adapted by the University, using Everett Rogers’ Diffusion of Innovations (DOI) theory as the primary model.

In every social system, there are some individuals and groups which are quicker to adopt innovations than the others. The quickest and most venturesome are known as “Innovators,” while the last to embrace change are called “Laggards.” The University of Australasia fell into this latter adopter category.

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Table 1. Questions and evaluation criteria

| | | Trigger | Opinion leader | Matchmaking | Some concerns |
|----|---|---------|----------------|-------------|---------------|
| 1. | What drove the innovation? | ✓ | | | |
| 2. | Who was the opinion leader? How was the need for change communicated? | | ✓ | | |
| 3. | How did the executive sponsor explore the opportunity? | | | ✓ | |
| 4. | How did the executive sponsor communicate his agenda? | | | ✓ | |
| 5. | How did the vendors react to the communication? | | | | ✓ |
| 6. | Was the outcome of the matchmaking in line with the expectation? | | | | ✓ |

EVALUATION CRITERIA

In appraising the matchmaking stage, a small number of broad questions (Ellet, 2007) using Rogers' DOI theory (1962, 2003) will serve as the evaluation criteria (see Table 1).

THE MATCHMAKING STAGE IN THE EXPLORATION PHASE OF THE INNOVATION PROCESS

Criteria 1: The Trigger

The innovation process can be dated from 25 July 2006, when Craig Smith, the University's Director of Finance, submitted a business case document to the University board, recommending the replacement of the old financial management information systems (referred in this case study as enterprise systems). This document was a mere formality, however, as the Board, as well as the University's Chief Operating Officer (COO), had already agreed in principle to the change.

This COO, David Ramirez, happened to be the last Director of Finance before Craig took over. During his term, he had asked a third party organisation to appraise the University's current enterprise systems. At the time, however, the University had more urgent investment priori-

ties than the information systems of the Finance Department.

Only when Craig assumed leadership of this division did the replacement of the old enterprise systems become Finance's number one priority. Nevertheless, David gave his full support and commitment to the new agenda (Figure 1).

This updating of the old systems was actually Craig's first priority as early as April 2005, when he was first hired by the University. As a new employee, he brought a very progressive attitude to the department. His biggest challenge when he assumed the reins, therefore, was dealing with a mindset more or less averse to change and development. He believed that he needed an experienced third-party change agent to help set his plans into motion.

Stanley Lim, the division's financial analyst since July 1997, brought Craig up to speed on the state of the old enterprise system, called BIZFIN. Table 2 lists the players. Though his first responsibility was to come up with a replacement for BIZFIN, the general lack of urgency towards the project had resulted in years of data gathering and little else. By the time Craig decided an innovation was in order, Stanley had collected about seven years of information.

Such a long "gestation period," so to speak, reveals something of the Finance Division's mindset. Along with the positive bias towards

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