WHITE PAPER

Why technology projects fail before they start

Most programs that go wrong were set up to. Not by bad software or a weak partner, but by decisions nobody was given the right to make. An essay on decision rights, sign-off, scope and the executive sponsor's real job.

01 The decisions nobody made

02 Four decisions that need an owner

03 The executive sponsor's real job

04 The owner on your side, and sign-off

05 Scope authority and saying no

06 A one-page decision-rights grid

For
Anyone setting up, sponsoring or approving a program

Time to read
About 25 minutes

Use it
Before the program kicks off, or when it stalls

A NOTE BEFORE YOU START

Projects are rarely lost in the build. They are lost in the first month, in meetings that end without a decision.

When I look back at the programs that struggled, the warning signs were there early, and none of them was technical.

A requirements workshop where three departments each assumed they would have the final word. A steering meeting that discussed the same question three times. A go-live date set before anyone asked who would test. A sponsor who attended the kickoff and then, quite reasonably, went back to running the organization.

Each of those is a question of authority, not of skill. Who proposes, who decides, who is told. When that is clear, ordinary people make good progress on hard problems. When it is not, very capable people spend their time negotiating.

This paper is written for whoever will set the program up, whatever their title, and for the board that approves it. It draws on more than 80 Salesforce implementations for associations and nonprofits, but very little of it is about Salesforce. It is about how an organization arranges the decisions so the work can move.

There is a one-page grid near the end. Fill it in before kickoff. It will take an hour and save you a season.

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The short version

- Every important decision needs one person who makes it.
- The sponsor's job is to break ties, protect time and say no.
- Someone on your side must own the program day to day.
- Agree what "done" means before you agree a date.
- Scope changes go through one door, with a cost attached.

How this differs from a checklist

Our paper *Ready before you build* covers what to have in place. This one covers who decides, which is what makes the rest of it possible.

Worth remembering. A decision that has no owner still gets made. It just gets made late, by default, by whoever is left holding it.

01 · THE DECISIONS NOBODY MADE

A program is a long series of decisions. Most of them are not technical.

From the outside, a systems program looks like a technical undertaking. From the inside, it is a few hundred decisions, made one after another, most of them about how the organization wants to work.

Should a lapsed member keep portal access for thirty days or none? Does a gift from a donor-advised fund credit the fund or the donor? When a chapter and the national office both hold a record for the same person, which one wins? Is the event registration form allowed to change this year, or does it wait? Can we go live without the old reports, if the new ones are ready a month later?

None of these is hard to answer. Every one of them is hard to answer if nobody knows whose answer it is. That is the failure I want to describe: not a wrong decision, but an unowned one.

> An unowned decision does not stay unmade. It gets made by default, usually by the person configuring the system, who is the person least placed to make it.

Partners, ours included, will fill a vacuum if they have to. A configurator facing a deadline will pick a sensible rule for lapsed members and move on. It may even be the right rule. But the organization did not choose it, may not know it was chosen, and will discover it later as a complaint, a surprised board member, or a report that does not match.

Multiply that by a few hundred and you have the program that "went fine technically" yet never quite fits the organization. Staff work around it. Spreadsheets reappear. Two years later someone proposes replacing it.

The remedy is not more meetings or a thicker requirements document. It is deciding, before the work starts, which kinds of decisions belong to whom, and making that visible to everyone involved. That is what people mean by decision rights. It sounds bureaucratic. In practice it is the opposite: it is what lets most decisions be made quickly, by one person, without a meeting.

02 · FOUR DECISIONS THAT NEED AN OWNER

Not every decision matters equally. These four decide the program.

Most day-to-day choices can be delegated freely. These four cannot, because each one quietly sets the cost, the timeline and how much the organization will trust the result.

1

What is in scope, and what waits

Every program begins with more requests than it can deliver well. Somebody has to decide which ones make the first release. If that person is the loudest department, the program will be shaped by volume, not by mission.

Belongs with: the executive sponsor, on a proposal from the program owner.

2

What our words mean

Member, lapsed, active donor, paid, renewal, credit. Each department has a working definition, and they rarely match. These definitions end up as rules in the system and numbers in board reports. They are policy, and they need one owner, often finance or the COO, who can rule when teams disagree.

Belongs with: one named leader, usually the COO or finance lead, with each department consulted.

3

Trade-offs between time, money and scope

Something will take longer than planned. The question is whether you add time, add budget or remove something. That choice has to be made within days, not at the next quarterly meeting, and by someone who can commit the organization.

Belongs with: the executive sponsor, within an envelope the board has already agreed.

4

When it is done, and when we go live

"Done" is the organization's judgment that the system can do its real work: renew a member, record a gift, issue a credit, produce the report the board relies on. That judgment cannot belong to the people who built it. Go-live is a separate decision again, because it is about readiness of people as well as software.

Belongs with: the program owner for acceptance; the sponsor for the go-live call.

03 · THE EXECUTIVE SPONSOR'S REAL JOB

Sponsorship is not attendance. It is a small number of hard things, done promptly.

In most organizations the sponsor is the executive director or COO, chosen because the program matters. Then the role is described as "championing" it, which is warm and rarely specific.

Championing is not the job. Staff can tell within a month whether the leadership cares, and speeches do not change that. What changes it is whether the sponsor does the few things only a sponsor can do.

Break ties, quickly

When membership and finance disagree about what "lapsed" means, someone has to choose. If the sponsor is unwilling, the disagreement becomes the program's pace. A good sponsor makes the call within a week, explains it in a sentence, and moves on.

Protect the time of the people who know the work

The program depends on a handful of staff who also run renewals, the conference and the year-end appeal. Unless the sponsor visibly takes something off their plate, the program gets their evenings and the leftovers of their attention. This is the most common way a sponsor is absent while appearing present.

Say no, and say it early

Every program attracts good ideas. The sponsor is the person who can say "not in this release" without it becoming a political event. Each early no protects the yes that matters.

Want bad news first

A sponsor who is told only good news is being managed, and the program pays for it later. The most useful thing a sponsor can say at a status meeting is "what are you worried about?" and then mean it.

What it is not

- Approving every small choice. That turns the sponsor into a queue.
- Attending every meeting. A short weekly check is enough if decisions get made in it.
- Owning the detail. That is the program owner's job.
- Defending the partner, or the plan, against evidence.

A realistic commitment

A standing thirty-minute slot each week, and a promise to answer escalated questions within a few working days. Most sponsors can give that. Few are asked for it plainly.

For board members. If you sit on the board, the most useful question to ask about a program is not "is it on budget?" but "who decides when it is not, and how fast?"

04 · THE OWNER ON YOUR SIDE, AND SIGN-OFF

A partner can run the build. Only someone inside can own the program.

Between the sponsor and the people configuring the system there needs to be one person on the organization's side who owns the program day to day. Without that person, the partner ends up running the organization's decisions as well as its build, which serves nobody.

The title varies: program owner, product owner, project lead. The job does not. This person gathers what each team needs, turns disagreements into clear options for the sponsor, answers the everyday questions without escalation, and is the voice of the organization in every working session. After go-live, they are usually the person who owns the system.

The commonest mistake is to give this job to someone as an extra. They are already running membership, or development, or operations, and the program is added on top. The program then moves at the speed of their spare hours. If the role matters, something else has to come off their desk, and it has to be said out loud.

Staff time is the budget nobody approves

Boards approve the partner's fee and the licenses. They rarely see the other budget: the hours of staff who must explain the work, review designs, test, and train their colleagues. That time is real, and when it is not planned it is taken from somewhere else, usually from members and donors. A plan that names the staff time, by person and by month, is a plan the organization can keep.

Sign-off is a decision, not a signature

At each stage someone signs off that the work is acceptable. Too often that becomes a formality: a quick look at a demo, a yes to keep the schedule. Real sign-off means the people who do the work have tried it with their own scenarios. Renew this member with a lapsed chapter. Record this split gift. Issue credits for this course. Produce last quarter's board report and compare it with the old one.

That takes time, and it must be scheduled before the go-live date is set, not squeezed in after. A date agreed before anyone asked who will test is a hope, not a plan.

05 · SCOPE AUTHORITY AND SAYING NO

Programs are rarely sunk by bad ideas. They are sunk by too many good ones.

Once a new system is under way, it becomes the place every unmet need goes. The events team would like a waitlist. Development would like a better way to handle tribute gifts. A board member asks whether the portal could show chapter leaders their own numbers. Each request is reasonable. Together they double the program.

The danger is not any single request. It is that each one is agreed in a different conversation, by a different person, and nobody is adding them up. By the time someone does, the timeline has slipped and the original purpose of the program has blurred.

One door for change

The remedy is simple to describe and takes some discipline to keep. Every request to change scope comes through one door, usually the program owner. Each one is written down in a sentence, with what it would cost in time and money and what it would delay. The sponsor decides, on a regular rhythm, and the decision is shared with whoever asked.

Most requests will be answered "not now". That answer is easier to give, and to hear, when there is a visible list of what comes next. A request on that list has not been refused; it has been scheduled honestly. A request agreed in a corridor has not been accepted; it has been hidden.

Be honest about phase two

"Phase two" is often where good ideas go to be forgotten, and staff know it. If the organization means it, phase two should have an owner, a rough date and a budget line in next year's plan. If it does not mean it, it is kinder to say so now.

A useful test for any change. Does it serve the purpose the board approved? If not, it may still be a good idea. It just belongs in a different decision.

A useful rule for partners. Ask yours to bring every change to the program owner, never to the person who asked. A good partner will welcome the rule.

06 · COPY THIS

The decision-rights grid

A starting point for a typical association or nonprofit. Change the names to fit, but keep one person in the Decides column for every row.

DECISION	PROPOSES	DECIDES	IS TOLD
PURPOSE AND MONEY			
Purpose of the program and what success means	Executive sponsor	**Board**	All staff
Total budget and the staged plan	Executive sponsor	**Board**	Program owner, finance
Trade-off between time, money and scope, inside the budget	Program owner	**Executive sponsor**	Board (at next report)
SCOPE			
What is in the first release	Program owner	**Executive sponsor**	Department leads, partner
A change request during the build	Anyone, through the program owner	**Executive sponsor**	Requester, partner
Custom build versus standard feature	Partner	**Program owner**	Executive sponsor
DEFINITIONS AND DATA			
What our key words mean (member, lapsed, gift, paid)	Department leads	**COO or finance lead**	All staff, partner
Rules for duplicates, chapters and affiliates	Data owner	**Program owner**	Department leads
Money states and reconciliation	Finance	**Finance lead**	Program owner, partner
ACCEPTANCE AND GO-LIVE			
Test scenarios for each team	Department leads	**Program owner**	Partner
A stage is accepted as done	Department testers	**Program owner**	Executive sponsor
Go-live, or a delay	Program owner	**Executive sponsor**	Board, all staff, members if affected
AFTER GO-LIVE			
Who may change the live system	Program owner	**Executive sponsor**	Admins, partner
Priority of improvements	Program owner	**Executive sponsor**	Department leads

Proposes brings a recommendation with options and cost. **Decides** one person, who answers within an agreed time.

Is told hears the decision and the reason, promptly.

07 · PUTTING IT TO WORK

How to use the grid, and how to tell it is not working

A grid in a drawer does nothing. The value is in the hour it takes to agree it, and in using it the first time a decision gets stuck.

Agree it before kickoff. Sit down with the sponsor, the program owner, the finance lead and the department leads. Go row by row. Where two people both expect to decide, you have found the argument that would otherwise have happened in month three. Have it now, while it costs nothing.

Add response times. A decision right without a time limit is a place for questions to wait. Most organizations settle on a few working days for the sponsor and same week for the program owner.

Share it with the partner. Any good partner will want to know who decides what. It saves them guessing, and it saves you from decisions made by default.

Revisit it at each stage. People change roles, and some rows will turn out wrong. Fix the grid, do not work around it.

Six signs the decision rights are missing

The same question comes back.
A topic appears in three status meetings in a row. Nobody owns the answer.

The partner is deciding policy.
You learn how lapsed members are handled by reading the design document.

Requests arrive by corridor.
Scope grows, but nobody can say when it was agreed or by whom.

The sponsor hears it last.
Problems reach the executive director from a board member, not the program.

Testing is "later".
A go-live date exists, but the test plan and the testers' time do not.

Everyone is consulted, nobody decides.
Meetings end with "let's take that away" and nothing comes back.

WHAT TO DO NEXT

Two steps before anyone configures anything

STEP 1

Name the two people

Write down who the executive sponsor is and who the program owner is. Then write down what comes off the program owner's desk to make room, and the weekly slot the sponsor will keep. If you cannot fill in those lines yet, that is the first decision.

STEP 2

Fill in the grid together

One hour, the people who will live with it, row by row. Keep one name in every Decides box and a response time beside it. Share the result with your board and your partner.

Leaders sometimes ask what they can do to make a technology program succeed, given that they will not be configuring it. The honest answer is that their part comes first, and it is the part that matters most.

Decide who decides. Protect the time of the people who know the work. Give one person the authority to run it, and one door for change. Agree what done means before agreeing when. Then let capable people get on with it.

None of that needs a new system. All of it determines whether the new system will fit.

IF YOU WANT A SECOND VIEW

Ready before you build, and the Digital Readiness Blueprint

Our companion paper turns these ideas into a fourteen-question readiness checklist. The Blueprint is a vendor-neutral assessment of four to six weeks that ends with a plan in stages your team owns. Use whichever helps; the grid above works on its own.