Choosing a Payroll/HR system: group decision-making techniques – part two

Hello again. In this final instalment of this series on group decision-making techniques we will cover the last three hats and discuss how to use them to help the product evaluation team make their decisions.

Speaking of hats: there was a little old lady standing at a corner. She had both hands holding her hat on while the wind blew her dress up around her waist.
A dignified businessman approached her and said, "Lady, you should be ashamed of yourself, letting your skirt blow around, being indecent, while both hands hold your hat."
She said, "Look mister, everything down there is seventy years old but this hat is brand new!"

Well hopefully it won't be too windy while we cover the remaining three hats, which are:

Green – (growth) "I think that this product will take us into the future as the organisation grows."
White – (facts) What are the facts, how many install sites does each vendor have, what are their support hours, how many staff do they have on helpdesk, how many consultants does the vendor have?
Blue – (what is our thinking) Where have we been spending our time. "Using the blue hat I think that we have been blacking hatting this vendor enough lets spend more time on the yellow hat."

Use the green hat to raise comments about the long term suitability of the solution. Discuss the vendor's product roadmap, their growth strategies; their alliance partners; and their vision of the future. At this point you might decide that some of this information is missing so let's consider the white hat. The white hat is about facts; firstly do we have enough information to make the decision? What additional information do we need to make the decision? Pop any questions into a table and send it to the vendors as follow up questions.

There is no specific order to using the hats however de Bono recommends red, white, black, yellow, green then blue. The logic is to get the emotional comments off people's chest first; then to focus on the facts; then the negative; then the positive then check that you have adequately covered all the hats. Technically, the same amount of time should be invested in each hat. Use the blue hat to police the use of the other hats. If the group is tending use the black or red hats too much then use the blue hat to suggest the use of a different hat.

The salient point to remember when using the hats is that you don't need to be an expert, just have a go, even using the techniques a little will help a lot. Using the hats is like anything, it just takes practise. A good way to practice using the hats is during the presentation debriefing sessions. Have a debrief after each presentation. Limit the session to 25 minutes.

Here are five tips from running a presentation debriefing session:
1. never evaluate someone's comment (just make a note)
2. always encourage everyone to make at least one comment
3. use the hats to balance the comments and gain a wider range of comments
4. drill down on any comment which seems a little vague
5. avoid debating interpretations of functionality – just note the issue for clarification by vendor later on

If you want to gain rich feedback from all members of the group (even the quite ones) be very careful not to evaluate any comments. Avoid saying "but that won't be an issue because we are changing that policy anyway." Nothing will destroy a person's willingness to contribute quicker. Remember that payroll people may not be as used to sharing their ideas in meetings as much as the HR or finance or IT people.

If everyone has run out of comments put your blue hat (policing) on, and suggest a hat which has not be used to gain some different comments. You might say, "if we green hat (growth) this vendor, what does the group think about think about the long term suitability of this solution?"

If the vendor does a poor presentation there will be a tendency for the group to black hat them. Control the situation by suggesting the use of the yellow hat (positive) to balance the negative. Conversely, if a vendor is generally favoured, the group will tend to overlook the negative aspects of the product and/or vendor; use some time in the black and white hats to keep the evaluation balanced and objective.

These debriefing sessions also assist the group to move through the group development stages also. You are probably aware of the forming, storming, norming, performing, and adjourning stages of group dynamics. Shortly put, by the time the evaluation team have had four to five debriefing sessions, using the hats, the team will be comfortable with working with each other and will perform better at making decisions.

So by now the team have: been through a few rounds of presentations and debriefing sessions; reviewed each vendor's documentation; completed a scoring spreadsheet on each vendor's capability; so now it's time to host the final decision making session. It is much easier if there is a stand-out vendor but if it is a close race, the decision will need some discussion.

Here are five tips on using the hats during an important decision making session:

1. have an open discussion without the use of the hats as a warm-up
2. observe and broadly categorise the comments made, by hat colour
3. use the blue hat to encourage comments for hats which have had little or no airtime
4. summaries the different views of the group
5. look for points of agreement

At the end of the day it does not matter whether the decision is made based on gut feel (red hat) or on quantifiable facts (white hat) as long the other hats were used to raise comments for consideration along the way and that everyone understands which hat was used as the basis of the decision. It is worth remembering that: *a consensus means that everyone agrees to say collectively what no one believes individually.* - Abba Eban

Good luck but don't go away. The next article is all about the true costs of running an in-house payroll department and how those costs compare with costs outsourcing the payroll function.

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