

Agility in a Time of Change:**Technical Services: Making it Happen**

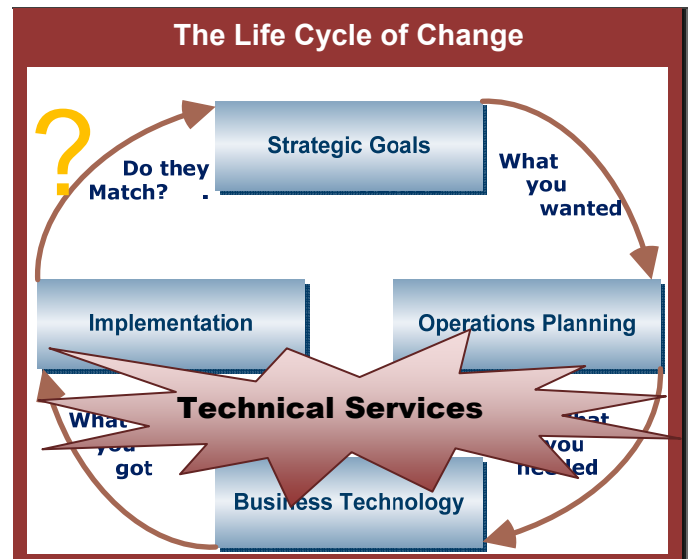
The time has come to make it happen/
to implement/ to bring about change.

Is this your comfort zone?

Yeager and Associates understands
change management: this is our core
competency. We can help.

Technical Services engagements are
designed to supplement your in-house
resources, performing tasks with a
minimum of process overhead.

The pages that follow describe several
types of engagements designed to
meet a client's specific requirements:



- [Technology Development](#)
 - For the times when a compelling business interest requires some degree of solution development, services include specifications, vendor selection, relationship management, and project management.
- [Implementation Preparation](#)
 - Preparation includes the planning of resources and training, and is designed to facilitate the communication and coordination across the team required for a successful rollout.
- [Implementation Services](#)
 - From the mechanics of conducting an RFP to data mapping, services are designed to minimize organizational disruption during these phases.
- [Business Process Improvement](#)
 - Once a business unit is identified for improvement, services include full process mapping, role definition, metrics for monitoring and use of tools.
- [Organizational Development](#)
 - For teams in crisis, services include task oriented trust building and the building of accountability mechanisms to nurture lessons into practice.
- [Evaluation& Dashboards](#)
 - The focus is on developing Key Performance Indicators (KPI) appropriate to the work being performed within the foundation.
- [Samples](#)
 - Links to past deliverables that are in the public domain are provided.

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<http://www.dougyeager.com/joomla/about-yeager-and-assoc/leadership.html>

A. Technology Development

Most foundations avoid projects that require the development of a new technology. It is expensive, risky, and not within the core competency of the organization. But there are times when a compelling business interest requires some degree of solution development.

All technology development projects will eventually include a relationship with a third party vendor to perform the programming and/or hosting of the solution.¹

The role of Yeager & Assoc. will be to assist a foundation in refining what it asks this vendor to do, and managing the vendor relationship during development and rollout. The absence of this role often sabotages technology projects.

An engagement for technology development will provide expertise to:

- Rigorous requirements definition, the bedrock of scope control.
- Risk Assessment: to identify and mitigate sources of risk
- Systems analysis, to explore the particular role of a new system within a landscape of applications in use by a client.
- Technical specifications: oversight of development partner specifications documents.
- Project management: budget planning, milestone and issue management, technical review and delivery assurance.

B. Implementation Preparation

Implementation and Transition planning is important because it pulls together the tasks necessary for placing a system in the hand of its users and customers. It includes elements that will facilitate communication and coordination across the team for a successful rollout. .

This engagement will focus on three aspects of implementation planning:

- Resource Requirements – Making sure you have all of the resources (financial, staff and management) to have a successful rollout. This section includes detailed templates for task assignments.
- Best Practices in Implementation and Transition – What are the things you need to watch carefully?
- Training - The proof is in the pudding: if users don't use the system, it is a failure. But training is expensive. This section includes strategies to formulate a cost effective just-in-time training plan

C. Implementation Services

These engagements provide specific technical services to execute a:

- A client has decided to do an RFP for CRM: Yeager & Assoc. runs the RFP.
- ...to implement a platform: Yeager & Assoc. provides project management services.
- ...to implement a solution: Yeager & Assoc. performs data mapping, conversion programming and testing.

These engagements will require a minimum of interaction with the client (maybe one face to face), and thus remove the in-house contention for resources that often delays project implementation.

¹ It is not in the business interests of an organization to rely on systems developed by a small vendor, no matter how talented, wonderful and cheap.

D. Business Process Improvement

There are times when a foundation needs an outside resource to examine in depth a particular business process or a set of processes surrounding a given line of business. This engagement assumes that the client has identified this aspect of their business in which it faces capacity issues and has sought assistance from Yeager & Assoc. to build an operations plan for this line of business.

- Business Process Improvement (BPI) will chart the flow of a process through the organization, detailing the functional steps, the roles performing them, and the systems used to achieve them. Metrics for existing processes will be collected for later analysis.
- BPI will recommend changes across all of the dimensions of the process, and provide estimates in the changes to the metrics.
- Special focus will be given to identifying the data points being used within the process, charting where they come from and where they go.

E. Organizational Development

Managing change requires more than choosing a strategic goal, setting objectives, choosing technology systems, and managing their implementation. Change also requires transformations in management practices, changes to organizational structure and culture, changes in staff skill sets, and changes to a staff's collective attitude towards risk. Without this transformation, organizational inertia will stifle and suffocate otherwise well executed plans.

Sometimes the changes in management practices, structures and skill sets are achieved happen stance through staff turn-over. But more often than not, this is a blunt instrument, prone to missing the mark and unintended consequences.

An engagement focused on organizational development facilitates a series of seminars on team and trust building, and in putting in place a mechanism of accountability to nurture these lessons into practice.

F. Evaluation & Dashboards

Project assessment is hard. Most organizations avoid it altogether; some organizations report on project timelines and budget, but ignore trying to assess its effects; some adopt a methodology designed to capture impact, but soon are buried in detail. The Yeager & Assoc. evaluation framework threads the needle to provide a practical approach.

Most evaluation efforts lead to a system of dashboards, although this is not a hard requirement. The focus is on developing Key Performance Indicators (KPIs) that are appropriate to the work being performed.

The evaluation research engagement brings together a team of stakeholders and leads them through a process to develop a laundry list of potential project goals and eliminate ones that are of marginal consequence, or which overlap with another. Without the "team", the results could appear arbitrary, which would undermine their acceptance. Each project goal is then evaluated for each of the following objectives, assessment criteria are established and metric defined.

2. Samples

Technology development is more than managing programmers as they code:

- it is about engaging with end users in a process of rigorous requirements definition and risk assessment;
- it is about tight working relations with vendors in developing technical specifications and in project management;
- it is about careful budgeting, scope control, implementation planning, testing and turnover execution.

All of these functions are less about technology than they are about communications, making sure that all stakeholders are actively involved, knowledgeable about the issues and ready to adopt the solution when delivered.

The following work samples illustrate this emphasis:

- Project Overviews:
 - RFI Scope for CRM: [crmfiscope.doc](#)
 - Integrated Requirements: Scope of Evaluation [tscintegratedrequirements.doc](#)
- Design Requirements:
 - Standards for Documentation: [api_style_guidevol2design_r2.pdf](#)
 - Specs for Investment Mgmt Interface to GL: [seamlessapiv1d.doc](#)
 - Advocacy for changing the way foundations make investment entries: [tscwhitepaperspeedingupfundaccountingforinvestmentsv1_2.pdf](#)
- Use Case Requirements:
 - Standards for Use Cases: [djylcusecaseintro.pdf](#)
 - Simple UC narrative: [find grantees use case.doc](#)
 - Advanced schematics: [businessobjectivecomponentsequencing.pdf](#)
- Project Management:
 - Milestone and issue management [tscissuestracker03162007.pdf](#)
- Business Technology Management:
 - The bigger picture in IT planning: [evolvingtheroadmap.doc](#)
 - Guide to IT project budgeting: [tscitbudgetforecast.doc](#)
- Implementation Management:
 - Implementation Planning: [tscimplementingtheroadmapv_1ch.pdf](#)
- General
 - Advocacy: [tscatlasdatabridgejustdoit2008v1_2.pdf](#)
 - Commentary [whenopenischic.doc](#)
 - Open Source Philanthropy: [cfaopensourcephilanthropyresourcesv2_0.pdf](#)