



Carnegie Mellon University

Welcome

95-822

IT Consulting



Carnegie Mellon University

Agenda

Welcome

Pre-Test

Your personal "Big Goals"

Overview of how this works:

- Your role
- Your client
- Your goals
- Your (senior professional) mentor
- Your process

Review Course Information

Review Course Calendar

Being certain of your ability to commit.

Homework

Your personal Big Goals

- What motivates you?
- What motivated you to come to Carnegie Mellon?
- What motivates you to take a consulting class?
- What is most important to you?

Discussion of the pre-test

- What were the goals (implicit or explicit) in your approach?
- What were the desired outcomes
 - At completion of the 12 weeks
 - At 6 months
 - At 12 months
- How would you describe your role as defined in your answer?
- What was the Executive Director's role?
- How would your answer be different if you were *hired* as the Executive Director?

The Role Practiced in this Class

- Capacity-Building Consultant
 - You will work in *partnership*
 - You both bring separate expertise
 - Neither can solve the problem individually
 - You will work to eventually make your help unnecessary
 - You will work so that *they* can own the solution
 - Not like the refrigerator repair person
 - You don't want them to call you every time they have a problem.
- We will have a reading for homework that describes this role in more detail.

Your Goals - #1 - Expanded Capacity

- To **expand** your client's **capacity** to use, manage, and plan for technology in their organization, its programs and in their own work.

[Notice - your first goal is not to build a system.]

Your Goals - #2 - Sustainability

- To expand capacity in a way that gives your client the ability to **sustain** progress made during the consulting period.

[Notice: what is important is what happens long after you leave.]

Your Goals - #3 - Vision

To **raise the bar of expectations** for effective use of technologies and help your client to create a **vision** for the role of technology in their organization.

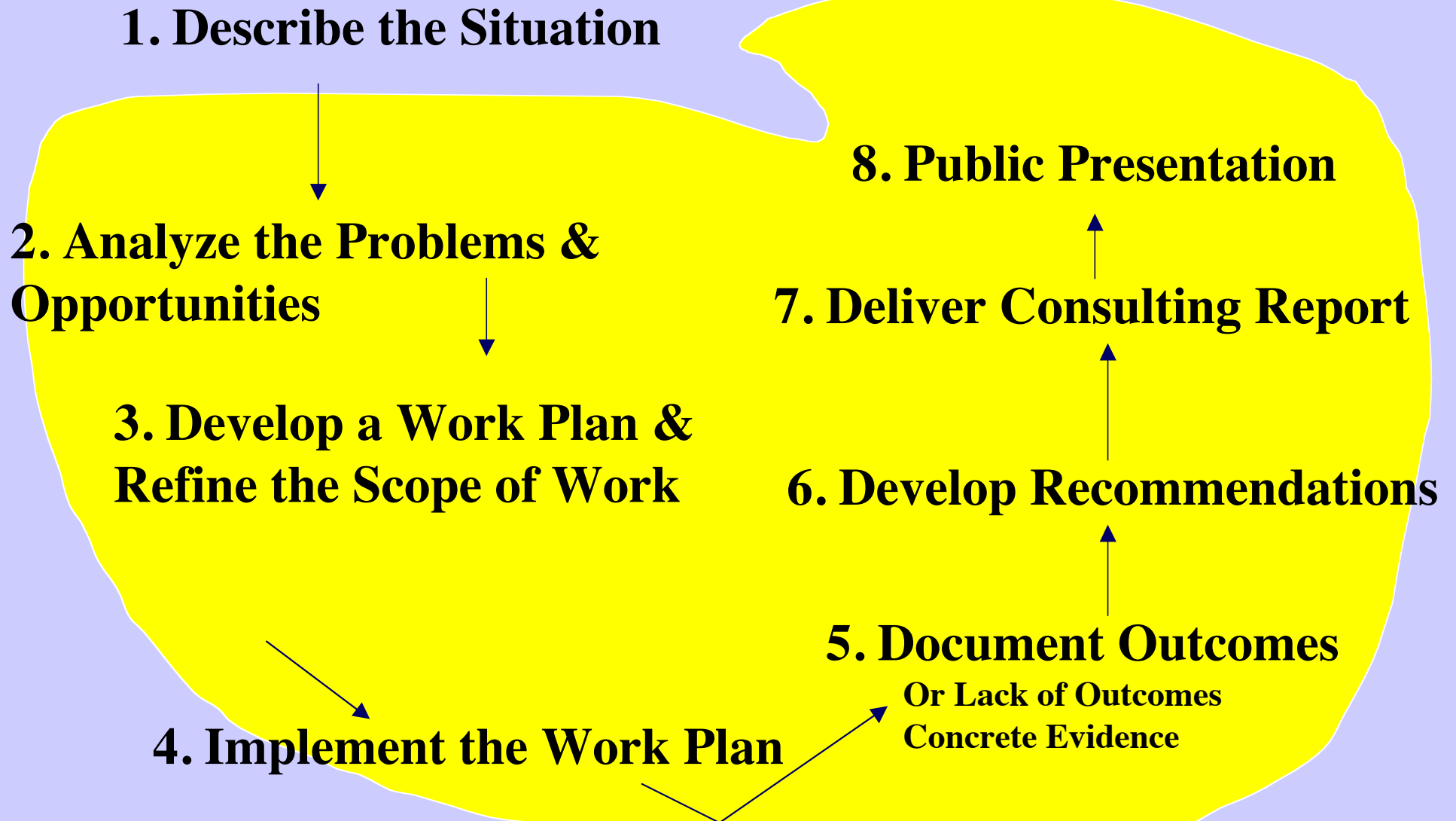
Your Goals - Summary

1. **Expand** what they know and do
2. In a way that is **sustainable**
3. And leads to a new **vision** of how technology can support their mission

Your Process

- You will learn a consulting process
- There will be steps along the way
- You are not just *thrown into the deep end of the pool*.

Consulting Process Overview



Your client

- Holds a leadership role in their organization
- Works with you 3 hours / week
 - Typically in two 90 minute meetings
 - Perhaps in concert with other staff
- Reads reports and offers timely feedback
- Sends me consulting logs
- Reviews your final report
- Presents with you at an end-of-semester event.

How are Partnerships Determined?

- I recruit the same number of clients as the number of students committed.
- I provide you with brief overview of each partner, with schedule and location.
- You provide TAs with a list of those that fit your schedule, transportation, skills, and interests.
- TAs create the pairings
- In a couple weeks you meet the client

What does the partnership do?

- Improve Communication
 - Deploy a CMS like WordPress
 - Create a social networking plan
 - Define requirements for outsourced web development

What does the partnership do?

- Improve Information Management
 - Simple Access database
 - Adopt Salesforce CRM
 - Design IS to be developed by team
 - Use pivot tables to analyze data

What does the partnership do?

- Technology Planning
- Design new computer lab
- Use special hardware for organization's function.
- Bottom line:
 - Identify the needs
 - Consider alternative solutions

The basics...

- Course information
- Course calendar

Being certain of your ability to commit.

- Your commitment involves someone other than yourself
 - In most courses, if you drop, it only affects yourself
 - (And makes the instructor's and TA's job one person easier)
 - In this course, someone external to the university is investing time into the partnership
 - Time (I.e. personnel costs) is by far the highest cost to organizations
 - The clients are very busy leaders in their organizations, and their time is especially valuable.

Being certain of your ability to commit.

I need to manage these relationships carefully.

- The class has a very good track record in the community.
- It is easy for me to recruit new partners by word of mouth.
- But I want to recruit only the right number of partners
 - Don't want someone coming to the dance, but be left alone.
- Bad experiences would travel quickly.

Being certain of your ability to commit.

Therefore:

- Look at your schedule
- Look at the work load of your other classes
- This course tends to take 9-12 hours per week on average
 - Much more in the first 4 weeks, much less in the middle.
- Determine if you are unlikely to have to drop the course.
 - Of course, emergencies do happen.

I ask the clients to make the same commitment.

Review Schedule

What is due for next class...