Carnegie Mellon University

Recommendations

Recommendations

- The final section of your final report will provide recommendations.

- Why provide recommendations?

Recommendation Sources

- Analysis of outcomes from work completed.
  - Example: as a result of the outcomes, I recommend X in order to Y—moving toward sustainability, expanded capacity, etc.
- Problems & Opportunities
  - identified in the causal flow diagrams or work process diagrams but not included in the scope of work.
- Your experience
- The knowledge and experience of your peers, especially their consulting experience.
- Your professional mentor.
- Your literature review research and other reading.
- Your client.

Past recommendations

- Disaster plans (business continuity)
- Periodic hardware replacement plan
- Data security
- Laptop usage out of office with clients
- Mobile accounting application
- Eliminating paper logs
- New use of technology in a program
- Develop technology plan
- Web site content changes

Past recommendations

- Add specific functionality to database
- Job description and requirements for hiring tech support
- Adopt new accounting package
- Computerize intake forms
- Specific staff training options
- Reorganize computer layout

Questions to prompt you:

- If you were a client or constituent of the org, what would you do?
- What if cost was not an impediment?
- What if time was not an impediment?
- What would you do if the client was not resistant?
- What are your client's favorite ideas?
- If you had your client's job, what would you do?

Recommendation requirements

1. Why should they implement it?
2. How can they implement it?
3. What resources can help them?

Recommendation requirements

1. Why should they implement it?
2. How can they implement it?
3. What resources can help them?

Why should they implement it?

- Requires a persuasive argument for why the recommendation is important.
- If the argument is that it would support their mission better, quantify how "better" would be measured (e.g. cost savings or via Return on Investment (ROI)).
- Or if the argument is for more efficient use of resources (people or funds), quantify how "more efficient" would be measured, e.g. time saved, money saved, or ROI.
- Think in terms of the same type of concrete outcomes that you presented in your Outcomes Analysis.

Recommendation requirements

1. Why should they implement it?
2. **How can they implement it?**
3. What resources can help them?

How to implement it

- Give concrete actions
  - At a level appropriate for the client to understand
  - Which they are able to implement
    - perhaps with help of other resources

Recommendation requirements

1. Why should they implement it?
2. How can they implement it?
3. What resources can help them?

What resources can help?

- Why are these resources useful?
- How should they use them to implement the recommendation?

Nothing obvious/stupid

- E.g. "Continue using email."

- It is not necessary to have a recommendation for each outcome if you have no recommendation to make.

Bad examples

- I recommend that the organization make a real effort to contact companies within the Pittsburgh area and request donations. These donations could be in the form of hardware, software, or simply expertise.

- I recommend writing a lot of grant proposals in order to obtain some money to buy new computers and software.

- Why are these bad?

Appropriate Expertise

- You are information technology consultants
- Not fundraising consultants
  - Don't recommend that they find funds
    - (that is obvious)
  - Don't recommend how they can find funds locally
    - (that is their expertise, and they have much more experience than you do)
  - If you find a national, technology-specific resource (such as cheap software via TechSoup, or Gifts-In-Kind), then it would be appropriate to provide that resource to them.

Bad Example

- I would encourage Bob to keep his skills fresh and lighten his web maintenance load by teaching Hank all he has learned about web design.

Appropriate Expertise

- You are not a management consultant:
  - Don't recommend staff changes
  - Do recommend staff goals:
    - e.g. "As your organization's the web site becomes a more useful and important asset, it will be important to have more than one person responsible for its upkeep. This will allow for more frequent updates, will distribute the ability to do updates beyond a single person in case that person is not available at any given time, and most importantly, it will lesson the risk to the organization if that one person would leave."
  - Notice: this doesn't manage how to implement staff changes (the management's responsibility and expertise), but does argue for the need for changes, from a technical perspective.

Appropriate borrowing

- Look over past reports, and find good examples that fit your situation.
  - Update and modify to fit your situation
  - Cite source and/or collaboration, giving credit.
  - Don't plagiarize. Take the best ideas, and reinterpret it for your specific organization.
- Get together with classmates who have similar issues.

Pick a number

- Pick a number between 1 and 40
- Must be unique
- Write on board (or spreadsheet)

Generating ideas

- Think of the technologies that you use, or know about.
- E.g. applications
  – Slack
  – OsiriX
- Or web sites / SaaS
  – Facebook
  – Trello
- Or devices
  – Nintendo 3DS
  – Amazon Echo

Using the ideas

- Take time to look over the list
- Consider for each:

  ? How could this be used by my client?

- Don't ask "Can this be used?"
- Mentally come up with *some* idea, no matter how ridiculous
- Make a note of the better ones, and continue down the list.

Creative test

- For each student consultant
  - Pick an item.
  - SC: hypothesize how your client or their organization could the item

Resources

- Including references to resources is:
  - Part of the persuasive case of how the recommendation is doable.
  - Provide:
    - A clear identification of the resource
      - How to find it
    - A description of why the resource would be useful specifically to them.
    - A description of how they could use the resource to implement the recommendation.

- A simple list is not useful

Resource Exercise

- What resources can a CMU student could use to plan their schedule for preregistration?
  - Identify the resource
    - Include how to find it
  - Describe what the resource is.
  - Describe how they could use the resource to implement the recommendation.

Positive Resource Example

Provide for Security and Backups: While much of this will be provided by third party support, it is important for DFSP to be cognizant of these important issues. The following article from Microsoft provides a great overview of some of the challenges when setting up a server for the first time: http://www.microsoft.com/smallbusiness/resources/technology /networking/5-things-to-know-before-buying-a-server.aspx. It should be made clear that moving from the third-party SharePoint hosting to a local dedicated server does not provide additional benefits with security or backups. Third-party sites attain certifications, endorsements, and partnerships by having great security, backups, and no downtime. By moving to an on-site server, DFSP now has to assume this responsibility

Recommendations Workshop

- Draft a set of 4-5 recommendation ideas *innovative*
  - At least 1 should be *innovative*
  - Each backed up by 2-3 sentences of explanation
  - Submit to Canvas
  - bring n copies to Recommendation Workshop
- You will discuss each student's ideas (present your own)
- Look for opportunities to work together.

out of
the box

Things coming due…

Review the calendar

Report Guidelines

- Review the requirements for the Outcomes Analysis and Recommendations Report

- This will be the 2nd half of the Final Consulting Report