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OUR PHILOSOPHY

At capITalise our aim is to increase the value Information Technology delivers to your business.

Several ways we can do this are:

- assessing the performance of the Information Technology you already use
- defining or updating the overall Vision you have for I.T.
- evaluating opportunities and their returns
- managing projects to implement your Vision
- enabling capability sooner by applying additional resource

The scope of Information Technology includes the hardware and software aspects of computers on your desktops, the servers, networks, cabling, communications systems for data and phone networks, Internet, email and Faxes.

Where you have existing internal skills and partnerships, we aim to supplement these to ensure the whole IT spectrum is covered - both Technologies you are already working in, as well as other opportunities.

Having external expertise to bring these benefits without building and maintaining of the specific skills reduces the cost of I.T. in your organisation.

Recognition of the various phases of projects is crucial when external partners are involved. We will ensure proper, documented handover of any new capabilities we implement or manage. See the section on Project Management for more details.

Our mission is to find opportunities where we deliver the greatest added value to your organisation. We will be successful when our customers grow stronger directly from the work we do. Hence the motto:

capITalising ...on technology

Many years previous experience in a well recognised Technology company, and working with many partner organisations has provided a wealth of experience in the introduction of Information Technology. We know that you need to apply technology for business returns, not for its own sake. We know it is important that systems are kept as simple as possible, and will work to minimise the size of the tasks.

This experience is the value we bring.

STRATEGIC PLANNING

Failure to consciously decide what role IT is to take is likely to lead to decisions being made for the wrong reasons, and deliver poor returns. Delivering to ill-defined expectations is likely to end in disappointment.

- are you working to a Vision ?
- do you have sound IT infrastructure to build on ?
- what are the key drivers for the business and hence IT ?
- if I.T. is difficult, do you know why ?
- do you know just what you are expected to deliver to whom ?
- does the daily pressure to resolve problems prevent development of strategic plans ?

We can develop your overall IT strategy, giving long term planning and visibility of directions and costs.

This need not be a large exercise, and it is still well worth doing for companies with modest IT requirements.

VALUE AND COST OF I.T.

Information technology is consuming a growing share of business revenues.

This growth places pressures on the organisation in a number of ways. The increasing use of IT requires increasing investment in both capital expenditure as well as skills and maintenance of systems. This can rise in an unplanned way. We can:

- assess the total cost of IT in your organisation
- relate this to industry norms in 3 categories
- look at which components are adding value
- help plan the future of your IT expenditure

MANAGING THE GROWTH OF I.T.

What determines the successful implementation and continuing expansion of IT?

As much of it is about the management process as it is about the technical skills applied. IT is normally a service, not an end in itself. Therefore, it is there to provide a service to its customers. This has two major components:

- setting expectations, monitoring and reporting on these
- delivering to these expectations

If no clear expectations are set, it is difficult to succeed, both in financial and technical performance. Many organisations focus too much on the technical aspects and capital costs, not appreciating the potential for lost time.

The degree of structure in the management of IT should be in proportion to the size and importance of IT. This means reviews from time to time on how IT should be managed, and by whom. CapITalise can assist with this, recommending whatever approaches are needed for your size and capability to bring predictability and control to your IT services.

I.T. SET-UP & UPGRADES

We can set up a site from scratch with servers, phones, network, cabling, desktop and mobile computers, Internet and email. Also we can upgrade sites to current standards or new requirements.

E.D.I.

Electronic **D**ata **I**nterchange can connect your finance, inventory and distribution systems to other partners. This transfers orders, invoices and packing slips between systems without re-keying, reducing cycle time and errors, and saving labour.

Points we will consider in an EDI implementation include:

- business relationships
- costs associated with the setup and running of EDI
- consideration of the lifecycle of your Information Systems
- communication
- security
- staff issues

Only once business relationship and people issues are covered should the technical aspect of EDI be started. A phased approach is recommended, starting out with high level checks, before proceeding to detailed justification and planning.

GLOBAL I.T.

Information Technology has broken down many barriers to doing business globally. It is now quite simple and cost effective to provide certain services internationally from your base location.

International Customers

You may be able to sell some or all of your services and products to an international audience. Web site creation is one part of this technology.

IT can offer real value here, because your information / services are visible / accessible worldwide without any "borders" to pass through.

Access Back to Home Base

Where employees need to travel to customer locations, I.T. can give them access to all information as though they were on site. Time zones can be utilised to allow centralized support staff to resolve a problem overnight ready for deployment the following morning.

All this is very readily available, and affordable even on a small scale. In fact one of the major benefits of this is the ability for small firms to compete with much bigger ones, because the entry costs are so low.

We can help you:

- review global aspects of your business
- review your current IT systems and how well they will adapt to global use
- recommend opportunities and changes
- do cost / benefit analyses
- manage implementations, including your Web site creation

COMMUNICATIONS

Communication of voice, Fax, email and data is a key service to any organisation, especially with multiple locations. New technologies present opportunities to deliver new value to you and your customers, while traditional services are becoming more affordable.

Internet technology can now deliver secure low cost communications between your sites, or you and your customers. You can lower the cost of doing business while distinguishing yourself from your competitors by providing new and better services. This technology is not suited to all communications needs, but adds a new price / performance option for you.

We can:

- review your current and future business communication needs
- report on how your current systems will handle this
- identify potential cost savings
- present and justify opportunities
- plan and implement IT changes

We will work with your existing Business and Technology partners, or establish new ones if required. Consolidation of services may bring significant cost savings.

Virtual Private Networks (VPNs)

These are systems which provide secure (private) communications over insecure systems (mainly the Internet). They can carry voice, data or any type of information.

These can be used nationally or internationally, and are a major driver in the reduction of the cost of communications. They should be considered as an opportunity to capitalise on.

PROJECT MANAGEMENT

Introducing new Business / IT capability needs project management. The level it is approached at will depend on a number of factors including team skills, size, cost and duration. The cost of unproductive time from problems with introduction of new technology can be a significant factor and needs to be realistically assessed with any planning.

You may wish to call on external assistance with project management for a number of reasons:

- you have business needs which are not being met by your current IT investment,
- you do not have experience in managing IT projects or specific technologies
- you need someone to assess which projects provide the best returns
- your internal resource is too busy on daily support tasks or projects
- you may have small, non-critical projects which will take a long time to reach the top of the queue, but actually provide a good return

Whatever your need for assistance, we can help you implement projects, by doing some or all of the following, as suits your particular needs:

- preparing the Requirements Specification
- estimating costs
- doing financial justifications
- selecting contractors if required
- identifying and managing risks
- ensuring key stages such as design, documentation and handover are done fully
- problem analysis and solution
- managing the project overall

MANUFACTURING AND BAAN ERP

We have experience from implementing an ERP system in a manufacturing Company. This includes the I.T infrastructure (servers, disks, network, clients and WAN) as well as the managing and implementation of the project.

Our hands-on Baan knowledge is detailed in the finance, manufacturing, distribution, EDI, tools and system configuration areas of Baan. We can help setup, train, and maintain a Baan site. Please call for more specific information.

DATA AND DOCUMENT MANAGEMENT

Much wider access to computers, and frequent use of graphics has resulted in an explosion of data at most sites.

Many issues are based around the end users, and the small percentage of people who find 'housekeeping' rewarding.

We can review your current systems, decide if there is a problem, recommend ways to improve, train people and implement changes.

I.T. TRAINING

With our wide experience across I.T., we can train you in many areas. We see many people struggling because they are missing a few key skills. Often these areas fall in between the major applications, the operating system, and the local network configuration.

Talking to people at their desk is the best way to spot needs and opportunities.

SERVICE LEVEL AGREEMENTS

Any company or group within a company which acts in a service role, will be working to achieve certain standards of service, whether or not this has been consciously decided and recorded. However, the expected levels of service will vary from person to person and particularly provider to customer. This can very easily result in friction and stress between staff and managers.

A Service Level Agreement:

1. is about the Services you will provide (and excludes the ones you do not)
2. defines the Level of these services expected
3. is Agreed between the parties at the outset

and is a great tool to aid the planning and management of your service team.

Here are some of the reasons why it may be a good idea to set up a Service Level Agreement for your service teams:

- to ensure providers and suppliers have the same expectations
- to ensure all Service staff know and provide a consistent level of service
- to quantify the budget needed to fulfill the level of service requested
- to ensure you cover the scope of service needed by the customers
- to have known targets for the service team to aim for and report against, and customers to see
- to provide a mechanism for rejecting work outside the scope planned and budgeted for

We can create a realistic SLA for what you do. You can then report against it, and amend it as needed. These can range from quite simple, to very detailed, depending on the issues you face. Even a simple document can provide major benefits.

Also, we can create an SLA for work you are outsourcing, for the same reasons.

RISK MANAGEMENT

Both the continuing operation of IT systems and the implementation of new systems have risks. While you may be aware of these, the risks and their consequences may not have been catalogued, or improvements considered.

With the benefit of experience, a small amount of planning can predict the risks and produce a plan to minimise consequences on your business. CapITalise can:

- record the points of failure of your IT infrastructure
- review the severity of these
- present improvement options ordered by best value to your organisation.
- review Disaster Recovery, recommend and assist with improvements.

Educational Information and Communications Technology

BACKGROUND

Educational institutions are now experiencing significant growth of both the quantity and extent of I.C.T. This brings new challenges, and requires some greater disciplines and management.

In particular, many are changing their I.C.T. from being a largely **non-critical** role, to a **critical** teacher and student classroom resource. (Where critical means lost time cannot be made up later that day)

This change of use should not happen unconsciously, but resulting from a review which approves the systems as secure. Any changes or additions to the systems themselves must also be carefully controlled.

MANAGEMENT

Much of the challenge is management not technical. It is important to cater for the people, training, change management, risks and visibility of any I.C.T. project.

KEY PROJECT STAGES

The development of I.C.T. should include the following steps.

1. Review of current I.C.T. position (technical and financial)
2. Strategic Plan for I.C.T. derived from the overall Strategic Plan
3. Budget and Funding Review
4. Resource and Supplier Assessment
5. Implementation Plan
6. Regular Reviews

Depending on the scale of the changes needed and the size of your site, some of these may merge. However, recognition of these aspects helps ensure a successful project.

THE ROLE OF CAPITALISE

CapITalise . . .

- has some of the additional skills you will need
- has knowledge of the industry to help select other partners
- is happy to fill the gaps, picking up as much or as little as you want
- can provide a second opinion, Quality Assurance or Risk Assessment of your own plans
- can lead a detailed plan

COST / BENEFIT OF ADVICE

Building I.C.T. to the level required two years from now is a serious task. Just as with any major project, you must get the 'big picture' right first, and good plans in place. Failure to get the right advice at this point can result in much higher costs and disappointment with timescales or capability.

ISSUES

Some issues which may apply to your I.C.T.:

- ensuring your educational plans drive I.C.T. actions
- I.C.T giving real educational benefits
- is I.C.T making your work easier?
- coping with the level of change
- forward plans and timescales for I.C.T.
- knowing the issues you will meet.
- knowing what I.T. really costs you now / will cost you in 3 years
- stress or differences in expectations around your I.C.T. support levels
- when you last had an external review of your I.C.T.

INTERNAL AND EXTERNAL I.C.T. RESOURCE

Each site has its own set of internal skills and external partners. You are likely to have built the skills for aspects you deal with on a daily basis, and do these tasks yourself. Staff training and development will be a part of this.

Building and maintaining skills in I.C.T. is expensive, because of the specialisation, the high rate of change of technology, and the cost of the qualifications. Aspects you only do occasionally will therefore normally be provided by others.

If teaching staff provide a significant support or resource, this will need reviewing with major changes in I.C.T.

RELEVANT QUOTES

(From NZCER's Paper on Information Technology in Schools, by David Harris)

"Any information or communication technology project that is contemplated for educational purposes must be carefully planned in terms of cost, time, installation and operation expertise needed "

"Expectations must be very clear to avoid raising hopes too high, resulting in misunderstandings and disappointment"

"Implementation of any new technology into a school is very likely to face difficulties involving installation schedules, hidden costs and the possibility of ongoing technical problems"

"Support for any new technology is essential to keep it working. A breakdown is frustrating, wastes time, and disrupts learning so a reliable system is essential"

"Expanded educational opportunities do result from well planned and implemented IT projects"

" Teacher professional development is required to allow for this and to enable the technology to be used in the most trouble free way possible."