Ouellette & Associates Consulting, Inc.

Achieving IT Service Excellence

If you're not serving the customer, your job is to be serving someone who is.
Jan Carlzon, ex-CEO
SAP Group

"Excellent. I've been to manyu workshops including several on customer service and this was by far the best."
Susan Bosco
Cigna

"This workshop is incredibly relevant to IT today! Excellent and critical to future success of service organizations."
Kris Littell
Banc One Services Corp.

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Building a Culture of Service in IT

This two-day workshop will help you build a common definition of service and an understanding of what is important from your *clients'* perspective.

Based on O&A's experience with thousands of organizations worldwide, we know that people in the IT field are committed to providing their clients with excellent service. However, they often deliver service based on what they, not their clients, think is important. This can result in misunderstandings, costly rework, and clients feeling like they haven't been heard.

Building a culture steeped in service excellence and one that is focused on your clients will help to ensure that in today's competitive environment, your organization will look at you as the "provider of first choice."

Participating in this highly interactive workshop will provide you with new ideas and a new approach for handling even the most difficult service challenges. It will give you the building blocks for a successful Service Strategy and position IT to deliver the right things to the right clients at the right time – not *all* things to *all* clients;

Program Goals:

- Develop an IT Service Strategy based on five key components.
- Increase your client satisfaction
- Understand and measure service through your client's eyes
- Identify, manage, and adjust to client expectations
- Encourage client complaints to increase service levels
- Develop strategies for handling difficult client situations
- Make the most of each Moment of Truth

Who should attend:

This workshop is designed for all IT Professionals.

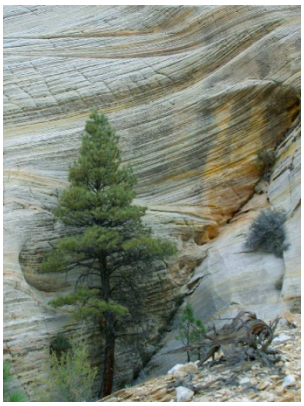
The more you engage with customers the clearer things become and the easier it is to determine what you should be doing.

John Russell, President, Harley Davidson

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The Art & Science of Testing Business Software



The Challenges of Software Testing

Software is a critical part of business today, and the testing of that software is just as important, whether it's bought or built. Yet, many business clients view software testing as a "necessary evil" because it is expensive, time consuming, resource intensive, disruptive to the business, and often not very effective.

O&A has developed a workshop designed to address these issues by focusing on the "functional" testing techniques that most often involve and benefit business clients. It provides a detailed 42-point checklist for developing an effective test strategy. The strategy includes sizing the testing effort, environmental preparations, documentation needs, control procedures, and concludes with the creation of a rock-solid test plan.

This three-day workshop examines the role of the Business Analyst as a testing facilitator between their business partners and IT and blends practical theory, proven methods, and leading-edge collaborative practices.

Short, focused exercises give participants the opportunity to practice these important testing techniques. The workshop stresses business client involvement, thoughtful planning, effective test case development, and crisp execution as the cornerstones to the testing process.

Program Goals:

- Prepare a comprehensive Test Strategy and Test Plan.
- Define and assess the "testability" of a Business Requirements Specification.
- Perform a high-payback Ambiguity Review (i.e., Requirements Scrubbing)
- Develop effective functional (Black Box) test cases.
- List and describe the testing events associated with Software Package acquisitions.
- Develop post-implementation test cases to fine tune a production system.

Who should attend?

Business Analysts and anyone in IT who is involved with software testing.

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Business Requirements Management



Gathering Business Requirements – An Essential Skill

The ability to quickly and effectively capture, validate and control client requirements is crucial to understanding and responding to client needs. If done correctly, it enhances communication and the relationship between project teams and their business partners.

Gathering incomplete, inconsistent and incomprehensible requirements can lead to missed deadlines, unhappy clients, and even project failure. Yet too often there are not intuitive tools or effective processes in place, and collection of requirements is left to chance.

This three-day workshop will provide participants with easy-to-use tools and adaptable processes to successfully define and manage business requirements on any project. It teaches a quick and efficient approach to documenting and verifying requirements. Participants will benefit from a more agile approach to business analysis - one that emphasizes speed, high quality, and effective client communications.

"Great class in terms of practical application. Not a theory and concepts class, which is hard to come by these days."
Nicole Greco
Fleet Bank

"Very helpful! I can now successfully define and document user requirements in a way that is useful to the customer, the design team, and management."
John Sierra
RH Donnelley

Program Goals:

- Gather critical information about 10 key requirement subject areas
- Use a Context Diagram to set the scope of analysis
- Specify essential processing, timing, control, and information requirements
- Establish a functional requirements baseline
- Define robust, stable and maintainable data structures
- Document client-centric processing with simple Use Case templates
- Identify critical development and implementation risks
- Develop an early project sizing and use it to assess schedule feasibility
- Estimate development timeframes using simplified function point counting
- Identify and document the key elements of a "testable" specification
- Implement good change management practices to minimize "scope creep"

Who should attend?

Business Analysts and anyone who interfaces with clients to collect requirements for projects of any size and scope.

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Consulting Skills for the IT Professional

Skills to Partner Strategically with Your Business Clients.



Consulting Skills for the IT Professional is a two-day workshop that will teach your IT staff and leaders how to build better, more consultative partnerships with your clients.

Clients are experts at running their business. They typically are not experts in knowing the right technology that will help them run their business *and* the organization better. This workshop will give IT the skills and ability they need to build a consultative IT organization that your clients will look to *first.* IT must become more consultative and build those partnerships with clients, or risk becoming a casualty of the outsourcing wars.

The Power of Influence: At O&A we define consulting as *influencing without direct power*. This workshop will teach participants new skills that will increase their power of influence, ability to negotiate mutually beneficial agreements, manage conflict, and develop value-added, problem solving strategic partnerships with your clients.

Program Goals:

- What is meant by being an internal consultant and why it's important.
- What it takes to start building credibility with clients.
- How to structure the consultant-client relationship.
- Skills that will help you improve your communication
- How to run more effective and efficient meetings
- What it takes to continue to build the partnership with your clients in a way that benefits you both

Who should attend?

Anyone in IT who has ongoing relationships with clients including:

Account Managers
Business Analysts
Application Support
Application Development
Hardware Support
Managers/Directors/Executives

"Make the other person happy about doing the thing you suggest."

Dale Carnegie

"It was a huge benefit and I learned a ton of things that I'll utilize the minute I leave the classroom."

Jennifer Biondo
Kraft Foods

"Great course that is well balanced with discussions and tips to handle tough situations often encountered in the consulting role."

Vivien Garrison
NIKE, Inc.

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Internal Negotiating Skills for IT Professionals

Place a higher priority on discovering what a win looks like for the other person."
– Harvey Robbins



Techniques for Negotiations You do Every Day

IT professionals at every level are constantly finding themselves in a position of having to negotiate for money, time, people, scope, standards, policies, and more. Given ITs unique role, and the fact that you have a relatively finite number of internal clients, those you negotiate with today are going to be your client, project sponsor and potential ally tomorrow.

This workshop has been developed to address these unique negotiating challenges faced by IT. It will help your team negotiate successful agreements while strengthening relationships with your business clients, as well as your internal IT clients.

During this two-day highly engaging workshop, we will change how you think about, prepare for, and engage in the negotiations you face every day. We will introduce a new philosophy, provide a new tool kit, and develop a new skill set that will allow you to leverage your personal negotiating style. As a result, you will create a climate for negotiating winning outcomes while building trust and increasing IT's credibility throughout your organization.

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Program Goals:

- Apply O&A's three-step negotiating process
- Join the ranks of skilled negotiators with better preparation and planning
- Challenge your negotiating assumptions and practices
- Change the tone of your negotiations by identifying interests vs. positions and separating substance from the relationship
- Disagree diplomatically when you don't agree with the other party
- Identify and deflect negative tactics that are used against you
- Address conflict situations before they spiral out of control

Who should attend?

Everyone in the IT organization will benefit from this workshop

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IT Meeting Management



Everyone Agrees There Are Too Many Meetings

Ask any IT professional at any level how much time they spend in meetings and you'll hear "too much!" Dig a little deeper and the problem becomes apparent, "Our meetings aren't that productive and rarely achieve the desired outcomes."

Like successful projects, successful meetings don't just happen. In today's IT environment, we can't afford to continue wasting thousands of hours and dollars a year on poorly planned and poorly run meetings.

This half-day workshop will give you and your team the skills, tools, techniques, and skills practice needed to coordinate and manage excellent meetings with each other, internal clients, and vendors. A case study provides all participants with an opportunity to practice and apply their new skills and tools to ensure progress towards improving the meeting culture.

"If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve, its full potential, that word would be 'meetings."

— Dave Barry

Very good (workshop)! Established guidelines for structuring meetings; establish roles and responsibilities & protocols that everyone follows. Like role playing, very helpful.

Participant, Covidien

Program Goals:

- Prepare, conduct, and participate in an effective meeting
- Boost IT's meeting productivity and image
- Standardize your IT meetings
- Understand the four purposes for meetings and methods for maximizing each one
- Utilize five different meeting roles
- Apply six decision-making techniques
- Handle opposing viewpoints when consensus needs to be reached

Who should attend?

The entire IT organization

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IT Project Management – the Human Side of the Equation



Why Focus on the People Side of Project Management?

Industry statistics reveal that only 26% of all IT projects finish on time, on budget and with all the promised features and functions. The remaining projects are lost in the maze of missed deadlines, cost overruns, reduced functionality and lost opportunities. Project managers and teams who are skilled at managing the "human side" of the equation follow the most efficient path to overcome project challenges and consistently deliver high quality results to support the business need.

This IT-specific workshop addresses the "why's" and "how-to's". It is loaded with practical tools, real-world exercises and team activities that address the unique challenges associated with IT projects – organized into three sections:

Structuring – Focusing on the client-project manager relationship, this section will show you how to turn an assignment into a project, using an effective yet basic framework for organizing your work.

Planning- Exploring the detailed work needed to plan your overall and day to day activities for the overall Project and each member of the Project team.

Managing – Monitoring and controlling your project to a successful completion. It also focuses on positive leadership skills that foster better client relationships and cooperation between the Project team and the client.

"The content of O&A's workshops is right on the money. There is no fluff or filler like you get in some other vendor's courses."
Tim Huwe
Schwan's

"I have attended roughly 25 classes and/or workshops on a variety of subjects. None of these courses could compare to the IT Project Management workshop."
Jamie Rubin
RAND

Program Goals:

- Identify biggest challenge associated with managing projects.
- Structure a Project and prepare a Project Charter
- Use Value Analysis to help prioritize multiple projects
- Prepare a detailed Project Plan to include: a work Breakdown Structure, estimating work effort and duration, assigning Project staff, developing a schedule, and documenting key assumptions
- Minimize "scope creep" by developing an effective change management process
- Monitor a Project's "real progress", develop useful Project tracking charts, and take corrective action.
- Develop a service-oriented relationship with your Project client
- Enhance your effectiveness as a Project manager
- Properly close and evaluate a completed project.

Who should attend?

New or experienced project managers, team leaders or IT professionals who work in a project environment and who are responsible for managing IT projects of any size.

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Leading Change across IT and the Enterprise

"If you want to change attitudes, start with a change in behavior."

— Katharine Hepburn



Taking Charge of Change

IT leaders are skilled at managing their people, however managing change is a different story. Too often IT leaders are expected to know how to lead a change, but often they are not prepared.

Regardless of the size or scope of change you are leading, effective change leadership skills are vital to your success. Whether your role change leader, change catalyst, or change agent, the role is critical to the success of the change initiative.

IT leaders play a central role as a partner in driving business strategy, business change, and business value. You must work hand-in-hand with business partners to crate transformation change within the company. And this workshop will give help to make you an effective change leader.

This interactive, highly engaging two-day workshop will give you the knowledge and tools to be an effective change leader. You will come away understanding what is involved in leading successful change initiatives in your organization, develop a positive approach to resistance, and recognize how your leadership behaviors can move all stakeholders in a new direction.

Program Goals:

- Manage the organizational risks, human challenges and success factors of major change initiatives
- Recognize the dynamics of change in action
- Use a change leadership framework and tools to lead change
- Create clarity and a roadmap for a specific change
- Identify the structures and processes needed to sustain a change

Who should attend?

This workshop is designed for anyone in IT who is a change leader, change agent, project manager, business analyst, or anyone who is involved with a project that will affect many people in the organization.

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Managing Vendor Partnerships

"(I learned the) importance of stepping back and looking at end to end for full process, developing change agents and communication plan, and identification of new skills needed for managing vendor partnerships."

Provided good atmosphere to think through how you can improve your current situation in managing existing vendor partnerships. You will get some good insights and nuggets that you will be able to use in your existing vendor partnerships."



From Managing Employees to Managing Vendor Relationships.

Because of the evolution in the global business economy, organizations are leveraging outside services more and more. These vendor services can provide added value through increased quality, lower costs, improved customer service, or implementation of best practices.

Increasingly managers' roles are changing from one of selecting and managing employees, to one of selecting and managing supplier relationships. The organization's employees are also coping with a change in the roles and the relationships with their internal clients. If these relationships are not effectively managed, organizations risk their reputation by missing deadlines, incurring higher than expected costs while receiving lower than expected quality, and lower staff morale.

This two-day interactive workshop provides a holistic approach to vendor management that enables organizations to more effectively work with their service providers and their own staff to create long term value and increase ROI from each of their vendor relationships.

Program Goals:

- Move from contact management to relationship management
- Understand and differentiate between goals and objectives of the organization and those of the vendor
- Leverage process management techniques to provide a foundation for managing vendor relationships
- Create balanced process performance metrics
- Utilize change management to transition employees to new roles
- Recognize a range of cultural differences between organization and vendor
- Be proactive in shaping a positive relationship and recognize when the relationship is in trouble
- Evaluate options for governance structures
- Improve supplier selection, contract development, and negotiation processes

Who should attend?

Anyone in IT who is involved with managing vendor relationships in the workplace,

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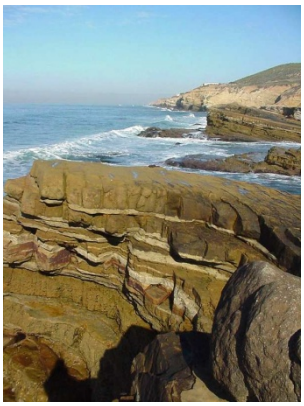
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Marketing IT's Value

"Think about why and how your audience uses technology and then start trying to align your communication efforts."
Brian Reich and Dan Solomon,
Authors of *Media Rules*



Why Marketing is Important

In many IT organizations, the "m" word is something we don't like to think about. Most people perceive marketing as negative and something only marketing professionals do. You hear things like: "Marketing is not my job", "I don't have time to market IT, I'm too busy doing my real work" and "Everyone knows what we do, why do we have to market?"

At O&A we describe "marketing" as "creating an awareness of your value." And in a time of increased outsourcing, and tightening budgets, it is even more important than ever to communicate to the organization what IT can do, and how you can help them. And, in order to effectively communicate that message, everyone has a role.

Participating in this two-day, highly interactive workshop will help your IT organization focus on benefits and solutions, not features and products. It also guides you through a process for building a marketing plan that is scalable depending on what you plan to market, and to whom. Whether you are building a large scale IT marketing plan, or ensuring that people in your IT organization are communicating the same message, this workshop will support your efforts. And you will soon realize that marketing is *everyone's* job.

Program Goals:

- Define marketing and its role in your IT organization
- Understand the value your IT organization brings to the table
- Develop your IT Marketing Plan(s) with our proven 13-Element Model
- Implement proven techniques based on your target audience and objectives
- Conduct market research and profile your clients (existing and potential)
- Measure your effectiveness against our indicators of successful marketing
- Leverage the power of "hallway marketing"

Who should attend?

This workshop is beneficial for everyone in the IT organization.

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Partnering for Success: Leadership and Communication Skills

"The art of communication is the language of leadership."

James Humes



Skills to Answer Today's Challenges

In today's fast paced, competitive, and continually evolving business environment, the need for partnering within business units, between business units, and with outside vendors has never been greater.

Many IT professionals are not well prepared to effectively deal with the people issues (building partnerships, negotiating agreements, dealing with resistance) and management issues (managing on a process versus functional basis where we no longer control all parties) necessary to build and maintain the relationships so critical to their success. And without these relationships, they will not be perceived and positioned as a fiber in the overall corporate fabric.

Building on the skills learned in the *Consulting Skills* workshop, *Partnering for Success* brings you to the next level. This interactive two day workshop is based on participant's real life scenarios, and throughout the session they work on these, applying newly learned skills and tools to help them handle the situation. When they leave the workshop, they are prepared to address these situations in a more professional and consultative way.

This workshop will bring your communication and leadership skills to a higher level so that client relationships are strengthened, your influence will make solutions to problems more broadly accepted, and client partnership is increased.

Program Goals:

- Understand and work through specific steps of O&A's Consulting Cycle
- Practice and apply tools within each step
- Experience what it's like to be a client
- Identify, consulting skills that need improvement
- Develop a personal and team action plan to provide consistent consulting services to your clients

Who should attend?

Anyone in IT who has ongoing relationships with clients including:

Account Managers

Business Analysts

Application Support

Application Development

Hardware Support

Managers/Directors/Executives

Pre-requisite: *Consulting Skills for the IT Professional*

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Politics of IT Project Management



Politics Can't Be Ignored

Politics is one of the most misunderstood and unappreciated elements in today's corporate environment. IT professionals at every level would rather avoid political activity, viewing it as negative and self-serving. And yet, it is all around us.

But, like it or not, we are all players in the political arena. In order to build high-level support, develop key alliances, and influence critical decisions, we must learn to understand and maneuver the political minefields across the organization. We need to build our political skills to complement our technical proficiency if we are to meet the needs of demanding clients.

This interactive two-day workshop will help IT professionals recognize the importance of, and practice, positive politics to become more respected, credible and influential within their companies. The more politically aware you are, the better long-term client relationships you will build, earning a reputation for delivering results, and earning "a seat at the table" of corporate decision-making.

"Yes, my view of politics has been changed. I had a negative view before, it's a tool now. Time well spent, will recommend."
—Tim Crothers
3M Corporation

Favorable - focuses on extremely important part of project management that is 'not talked about.' Very practical and down to earth - not a lot of theoretical fluff. Workshop is well organized and gives 'hands on' opportunities."

— Connie McClain
CareFirst BlueCross/BlueShield

Program Goals:

- Understand the impact of politics on project success (or failure).
- Identify the players of your political environment.
- Evaluate political actions from an ethical, principled point of view.
- Earn and create access to key stakeholders and decision makers
- Build relationships with key players.
- Leverage your personal power and maximize your ability to influence.
- Compete more effectively for scarce resources.
- Keep your projects on track through the use of positive politics.
- Recognize when negative politics are being used against you.

Who should attend?

This workshop is beneficial for everyone in the IT organization.

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Presentation Skills for IT Professionals

""The best speakers know enough to be scared… the only difference between the pros and the novices is that the pros have trained the butterflies to fly in formation."
Edward R. Murrow

Definitely recommend the techniques and class to other colleagues at all levels!

This (workshop) hones skills not only for presentations but for communications. Full of Great information shared in a useful and practical way.



Presenting To a Non-Technical Audience

Increasingly, a critical success factor for IT professionals is the ability to design and deliver effective presentations. Subject-matter experts must be skilled at conveying knowledge in ways their audience will understand and put to productive use. They must be able to make the business case for technological solutions – to sell solutions instead of selling technology.

This doesn't come easy to most IT professionals, but more and more it's becoming an expectation of the organization's leaders. Whether it's pitching a new idea to your boss and team, or presenting a project to the executive teams, you need to come across as a sharp, focused professional with the right solution to their business need.

This two-day workshop is focused on a single objective: to help IT professionals become highly confident and effective presenters to a variety of technical and non-technical audiences. Class size is limited to allow for maximum individual instruction and practice. Participants will have multiple opportunities to give presentations and receive instructor and peer feedback.

Program Goals:

- Increase your confidence, competence, and commitment in delivering presentations as an IT professional.
- Develop an effective presentation style which can be adapted to a variety of technical and non-technical audiences.
- Expand your specific presentation skills.
- Enhance your individual abilities and become a powerful presenter.

Who should attend?

Everyone in the IT organization will benefit from this workshop

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