

IT Management Effectiveness

Omega Point is an IT management consulting firm that specializes in working with Information Technology (IT) groups to achieve high performance and increased value to the businesses they serve.

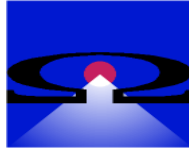
We help IT leaders strengthen and shape management capabilities, implement new ways of working, realign and re-structure, improve IT staff performance, and grow IT leaders to improve overall IT effectiveness.

Our consultants have deep experience in IT effectiveness and organizational change management, gained through positions in industry, consulting, and research. We work across all major industry sectors with Fortune 500 organizations, as well as with dynamic and progressive smaller companies and institutions.

Representative engagements and clients are summarized on the following pages.

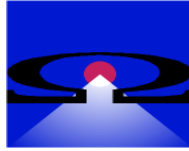
We have applied expertise serving global firms in the following markets:

- ✦ Financial Services
- ✦ Government
- ✦ Healthcare
- ✦ Banking
- ✦ Retail
- ✦ Pharmaceuticals
- ✦ Manufacturing
- ✦ Consumer Packaged Goods
- ✦ Education



**NATIONAL
HEALTHCARE
COMPANY**

- ◆ Worked with the CIO and IT senior leadership team in four organization redesign efforts over a decade; redesigned the organization structure, operating model, and work practices of an 2400-person IT organization to more effectively align to their changing mission
- ◆ Worked with leaders to define values for the organization and to guide culture changes
- IT ORGANIZATION DESIGN
 - ◆ Facilitated the development of operating models, roles, and responsibilities for new competency centers in:
 - ◆ IT Strategy & Planning
 - ◆ Quality Management
 - ◆ Project Management
 - ◆ Advanced Technology & IT Architecture
 - ◆ Security, and
 - ◆ Education & Employee Development
- IT IMPROVEMENT PROGRAMS
- IT GOVERNANCE
- RETREAT DESIGN & FACILITATION
 - ◆ Worked with trailblazer division CIOs and their directors to implement a distributed IT support model, including all related IT governance and support structures
- ROLE/JOB CLARITY INITIATIVES
 - ◆ Designed and conducted leadership team retreats to focus on organizational effectiveness, strategic issues, and leadership team development
- CLIENT SUPPORT SERVICES TRANSITION
 - ◆ Guided the implementation of new organization structures through a set of transition projects and teams; coached senior leaders in their role and advised on all aspects of the transition
- ENTERPRISE PORTFOLIO MANAGEMENT & GOVERNANCE
 - ◆ Worked with the enterprise (not just IT) EPMO to design and establish a portfolio management and governance process and advise on its implementation
 - ◆ Developed the skills of IT leaders at middle levels of the organization through bi-weekly work sessions, reading plans, one-on-one coaching, and facilitation of particular changes in their groups
 - ◆ Facilitated process improvement efforts in work management, business-IT partnership, project management, portfolio management, software development, and ITIL process areas
 - ◆ Facilitated the clarification and definition of jobs, job levels, career paths, and development activities for key areas
 - ◆ Provided transition planning support, ongoing coaching, and guidance for a major transition in the IT client support group for the company



**FINANCIAL
SERVICES
FIRM**

IT VISIONING &
ORGANIZATION
DESIGN

IT GOVERNANCE

ORGANIZATIONAL
CHANGE MANAGEMENT
FACILITATION

OFFSITE CHANGE
RETREAT

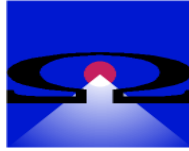
- ◆ For a leading provider of processing, technology & business solution for the global investment industry, worked with the new CIO and IT senior leadership team to clarify the vision and direction for the IT organization
 - ◆ A complete technology infrastructure architecture redesign was involved, impacting the company's core product line
 - ◆ Created communication materials and guided discussions of the future state, creating details by working with key leaders
 - ◆ Assisted in architecting the new IT governance process and implementation plan
- ◆ Facilitated the organizational change management plan and guided key leaders in their change leadership activities
 - ◆ Defined the implementation plan with team leaders
 - ◆ Designed the organization structure with leaders
 - ◆ Facilitated the visioning of new parts of the organization
 - ◆ Designed and facilitated manager forums to engage middle level managers regarding the change
 - ◆ Created communication plan and managed the development and distribution of critical communications
- ◆ Designed and facilitated a 2-day weekend offsite session to:
 - ◆ Engage resistant business area leaders key to the change effort
 - ◆ Surface the cost of not changing to the organization
 - ◆ Design key elements of the change programs with each IT area leader

**GLOBAL
FINANCIAL
SERVICES
COMPANY**

IT LEADERSHIP
DEVELOPMENT

IT PROCESS
IMPROVEMENT

- ◆ Advised a business unit CIO and his team on organizational development issues and IT leadership issues for their group
- ◆ Conducted a series of IT Leadership Forums for the top 40 technology leaders to strengthen leadership skills and enable specific culture and behavior changes; forums took place every quarter and were focused on a specific topic (e.g. moving from order-taker to enabling leader)
- ◆ Created an IT process improvement methodology and baseline training for IT process teams and leaders
- ◆ Created a structure to manage a portfolio of IT improvements



**HIGHER
EDUCATION:
STATE
UNIVERSITY**

IT ORGANIZATION
DESIGN

INTEGRATION OF
SEPARATE IT GROUPS

BUSINESS/IT
PARTNERSHIP MODEL

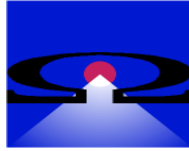
IT GOVERNANCE

- ◆ Worked with the CIO and IT senior leadership team to analyze and implement the integration of two separate IT organizations that had developed because of an ERP implementation
 - ◆ Led process to assess two separate IT organizations that were to be integrated
 - ◆ Led mapping of current organizations into new organizational model with IT leaders from both organizations
 - ◆ Shared knowledge of leading IT management practices, processes, and organization designs
 - ◆ Facilitated the analysis and sizing of the new organization
- ◆ Led the development of a Business/IT Partnership Model
 - ◆ Facilitated a committee of university leaders brought together to define how business/IT partnership would function
 - ◆ Defined roles & responsibilities for a new role, partnership leader
 - ◆ Defined governance structures for IT decisions
 - ◆ Defined measures of success and an implementation plan
- ◆ Guided the implementation of the new organization structure with Human Resources and the IT Human Resources groups
 - ◆ Developed/updated guidelines, documentation, and forms for staff assessment and placement with HR leaders
 - ◆ Led the analysis of projected impact
 - ◆ Facilitated team meetings with IT HR and HR
 - ◆ Created a transition plan and led transition efforts
- ◆ Developed skills of IT leaders at middle levels of the organization through one-on-one coaching

**MARKETING
COMPANY**

IT LEADERSHIP MODEL

- ◆ Developed an IT leadership model and implementation strategy for the IT organization
 - ◆ Provided foundation IT leadership model from research
 - ◆ Facilitated customization of the leadership model, competencies, and behavioral key actions with CIO and IT leadership team
 - ◆ Worked with Human Resources to identify implementation strategy for leadership model



REGIONAL BANK

IT ORGANIZATION DESIGN

ARCHITECTURE FRAMEWORK & GOVERNANCE IMPLEMENTATION

IS REENGINEERING IMPLEMENTATION

- ◆ Served as advisor and coach to a technology services design team responsible for implementing a new organization model
 - ◆ Assessed alignment of proposed organization model and structure with IS strategy and objectives, identified gaps, and recommended modifications
 - ◆ Defined a set of implementation programs
 - ◆ Identified and defined new IS roles, such as Technology Process Manager, to support new organization design
 - ◆ Defined new relationship management role and function
 - ◆ Defined new work load planning process to support the flow of work from relationship managers into development groups
 - ◆ Outlined communication strategies and plans to support the implementation of the new organization model
 - ◆ Supported and coached the team as they implemented the new model

- ◆ Assisted in deploying an IT Architecture framework and in implementing mechanisms (architecture roles, structures, competencies, processes, deployment plan, change management activities) to sustain & evolve the architecture

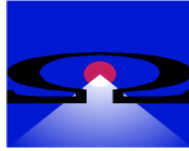
- ◆ Helped an IS Reengineering group create a shared vision and implementation plan for its reengineering effort, which established new methods to improve productivity and quality in the software development process; facilitated the visioning, developed an operating model, and implemented a continuous, dynamic planning process for their IS reengineering program

GLOBAL CHEMICAL COMPANY

IT ORGANIZATION TRANSITION PLANNING

OFFSITE VISIONING SESSIONS

- ◆ Facilitated the development of a transition plan for a new IT organization design
 - ◆ Facilitated discussions about implications of new organization structures
 - ◆ Surfaced cultural change issues that were core to the success of the new structure
 - ◆ Identified changes in IT governance that were needed
 - ◆ Facilitated off-site meetings of global IT leadership team on vision and structure of new organization
 - ◆ Developed transition plan for organizational changes



REGIONAL BANKIT STRATEGY
DEVELOPMENT &
DEPLOYMENTIT IMPROVEMENT
PROGRAMS

IT GOVERNANCE

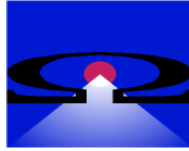
- ◆ Facilitated the development of a new IT strategy, and the refreshing of this strategy each year
- ◆ Built the IT group's capability to implement the IT strategy
- ◆ Assisted in architecting an overall improvement framework and implementation plan
- ◆ Coached IT leaders and change teams in programs for a continuous learning process, relationship management, organizational change management, IT process deployment, quick hit projects, service level agreement (SLA) development, balanced scorecard measurement, portfolio management, and trailblazer projects
- ◆ Conducted IT process workshops with leadership team to educate on process management, set process definition priorities, assess current state, and share leading practices in process management
- ◆ Facilitated the definition of culture changes and their implementation
- ◆ Assisted in establishing project management discipline
- ◆ Assisted in the design and implementation of IT governance structures

**GLOBAL
INSURANCE
COMPANY**BUSINESS/IT
PARTNERSHIP MODEL
& RESEARCH

- ◆ Facilitated the development of a business-IT partnership model and implementation plan by a group of IT and business leaders
- ◆ Conducted research into leading practices in business-IT partnership to support the development of the partnership model
- ◆ Identified key culture changes that would be necessary for the partnership model to be effective

**NATIONAL
HEALTHCARE
COMPANY**CONFLICT RESOLUTION
SESSION

- ◆ Designed and facilitated sessions to bring two major consulting firms and the client together in understanding architectural concerns, impact, and implications on a major development project that had invested over \$140 million to date
- ◆ Session was politically charged with a diverse set of participants, all with individual agendas
- ◆ Set decision rules, gradients of agreement, rules of engagement, and action planning guidelines



**NATIONAL
BANK**

ADVANCED
TECHNOLOGY GROUP
OPERATING MODEL

IT PORTFOLIO
MANAGEMENT &
GOVERNANCE

- ◆ Worked with the strategic technology group to develop and implement an operating model for the identification and management of the bank's strategic technology initiatives
- ◆ Helped define the group's operating strategy, performance measures, operating processes, roles, and structure
- ◆ Introduced portfolio management techniques and facilitated the development and analysis of portfolio for managing current projects and new technology introduction
- ◆ Facilitated portfolio management, role-based associate assessment and development, process definition, and implementation planning

**GLOBAL
PHARMACEUTICAL
COMPANY**

IT RETREAT DESIGN &
FACILITATION

IT PORTFOLIO
MANAGEMENT

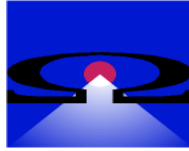
IT HUMAN RESOURCE
STRATEGY

- ◆ Reviewed and advised on a business unit technology group's strategy and innovation practices
- ◆ Presented research findings on current practices in IT-enabled business innovation
- ◆ Facilitated planning retreat sessions in IT innovation, IT value and credibility issues for the organization
- ◆ Introduced portfolio management as a management technique to enable innovation and facilitated development on business contribution portfolio maps for the business unit's applications
- ◆ Advised on development of an IT human resource strategy, contractor usage strategy, and talent management process
- ◆ Researched best practices in building capability in project management

**GLOBAL
PHARMACEUTICAL
COMPANY**

IT PORTFOLIO
MANAGEMENT

- ◆ Assisted in the design and implementation of a set of portfolio management frameworks and a portfolio management process by which Information Officers across the world identify investments of highest strategic value, opportunities for consolidation, and resource optimization
- ◆ Process included both local portfolio management and global portfolio analysis



**STATE
GOVERNMENT
WORKERS'
COMPENSATION
DIVISION**

IT IMPROVEMENT
PROGRAMS

- ◆ Implemented new management practices for the IS organization and coached senior IS executives and middle managers in their changing roles
- ◆ Helped the organization define and implement the following:
 - ◆ New work management processes for IS
 - ◆ Roles and competency models
 - ◆ A personal development planning process for IS professionals
 - ◆ A customer satisfaction survey and communication structures for IS and their customers
 - ◆ A measurement framework for IS capability
 - ◆ An approach for IT strategy, planning, and governance

**HIGHER
EDUCATION:
STATE
UNIVERSITY**

VOICE & DATA
NETWORKING
ANALYSIS

- ◆ Led the assessment, analysis and recommendations of IT enterprise networking and integrated telecommunications services to determine whether the two functions should be merged
 - ◆ Led the assessment of services provided by each organization
 - ◆ Identified opportunities for collaboration on technological solutions
 - ◆ Defined work processes that should be shared by both organizations
- ◆ Facilitated the benchmark/leading practices team
 - ◆ Facilitated data gathering with peer universities and universities recognized as progressive in this area
 - ◆ Led the data analysis and summarization of findings
- ◆ Designed a collaborative projects process with the leadership of both groups to provide a common framework when working on initiatives that cross both areas

**GLOBAL
FINANCIAL
SERVICES
COMPANY**

TECHNOLOGY
OPPORTUNITY
IDENTIFICATION
PROCESS

- ◆ Assisted in implementing an opportunity identification process to facilitate the discovery, evaluation and harvesting of technology-enabled business growth opportunities
- ◆ Participated in the development of a toolkit of techniques to support this process, including portfolio analysis and organizational change management