Executive Presentation

on using

Management Dashboards

to support the processes of

Infrastructure, Production, Compliance, and Recovery Certification

Created by:

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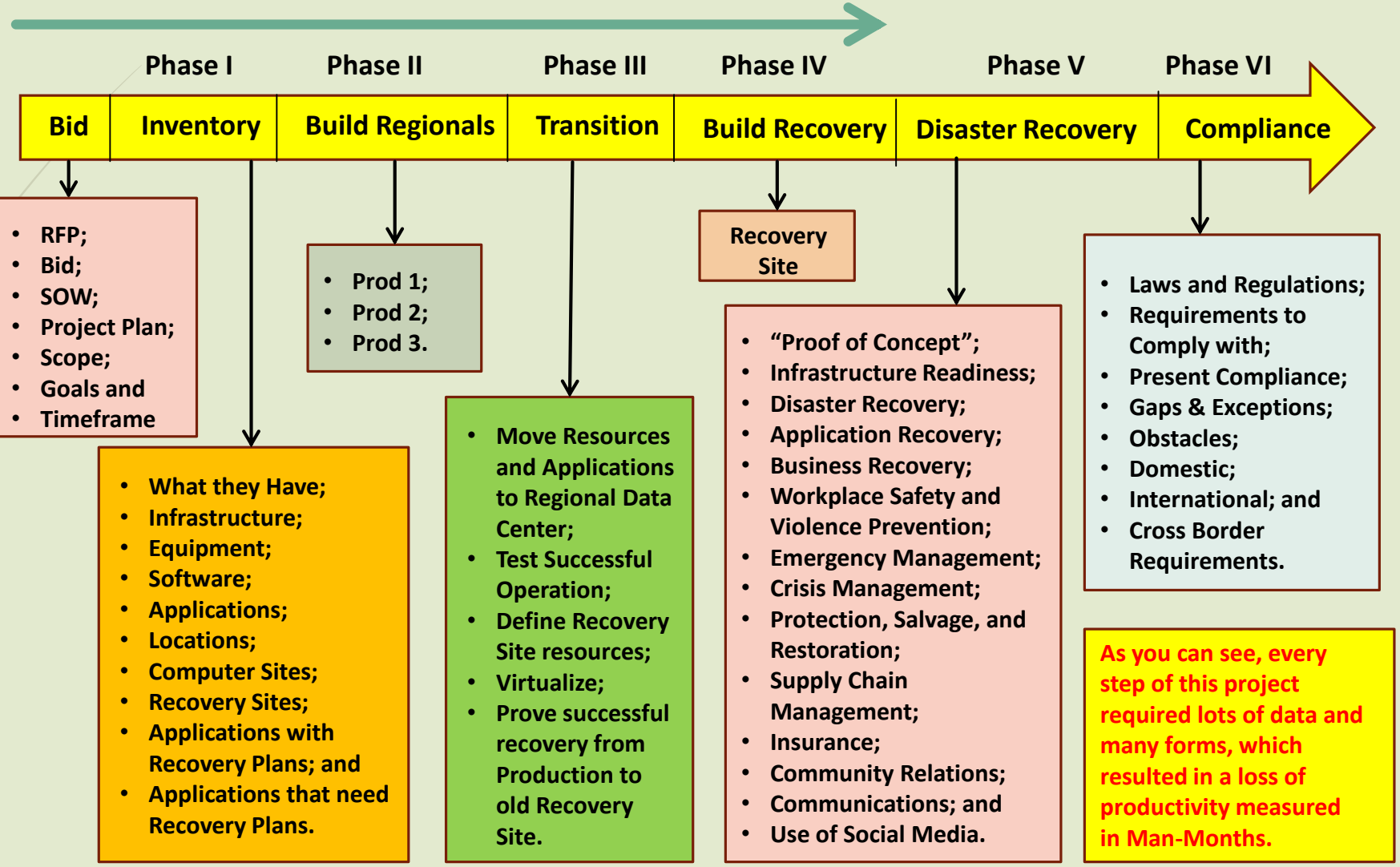
A Dashboard that acts like a conduit between personnel and the most current and accurate data, that allows youto drill down to the actual work being performed and connect you to the person performing the work. All this from anywhere and at anytime, thereby reducing the need for conference calls and remote meetings, thereby improving productivity and helping you beter achieve your goals on-time and within budget.

My Last Project was world-wide and extensive



Why I developed the Dashboards

- Project was slipping its schedule and productivity was being lost due to inaccurate documents and misleading documentation;
- Too much time was spent in Conference Calls and Remote Meetings, where people did not have the right data in front of them;
- Confusion was rampant and nobody trusted the literature, which affected the status reporting and delivery schedule;
- Management was getting very upset because they were not receiving straight answers or could not examine project data directly;
- Costs were getting out of hand and work flow tracking was not being performed;
- There was no way to improve efficiency following the current path;
- The company and its reputation were in great peril because the final goal of having a virtual environment that could recovery all Tiers (CA, HA, Best Effort) of applications was no where in sight; and,
- I saw the Dashboards as a tool I could use to help clients succeed better.

What the Problem is

- Difficulty in coordinating activities across multiple sites led to project slippage and loss of management control.
  - Too much information, and unfortunately most of it is out-of-date, inaccurate, and extremely difficult to find.
  - People lost confidence in the documents they dealt with because Version and Release Management Guidelines were not adhered to.
  - Inability to communicate across multiple sites was a major problem (continents, countries, cultures, and languages were all problems as well).
  - Delays, confusion, chaos, and loss productivity was getting out of control – Something had to be done to control document accuracy.
  - When important decisions needed to be made, management and personnel were not able to access what they needed from any location at anytime, nor did they have confidence in the information.
  - Too many resources are spent in conference calls and remote meetings causing wasted time away from performing assigned functions.

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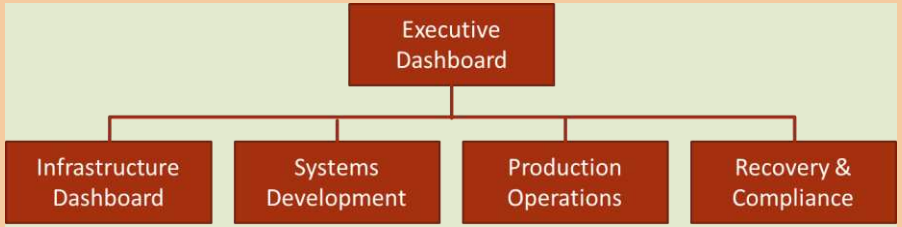
What is the Solution

- **Provide Management with Dashboards having Drill-Down capabilities:**
  - **Executive Dashboard;**
  - **Infrastructure;**
  - **Systems Development Life Cycle (SDLC);**
  - **Production:**
  - **Recovery Management; and,**
  - **Compliance.**



- **Accomplished through Enterprise Resiliency and Corporate Certification:**
  - **Enterprise Resiliency combines all Recovery Discipline under one Department's control;**
  - **Corporate Certification guarantee's adherence to all required Laws and Regulations in the countries that your company conducts business;**
  - **Utilize a "Work Order (WO)" and "Purchase Order (PO)" mechanism for cost accounting;**
  - **Forms Management and Control is included to provide forms and track them through their Life Cycle until completed, allowing access to the individual performing a task at any time and from any authorized terminal anywhere;**
  - **Personnel Training, Career Path assistance, and Performance Management; and**
  - **Charge-Back system to allow for the comparison of new projects against previously performed projects, so that effort and cost can be compared and better estimated.**

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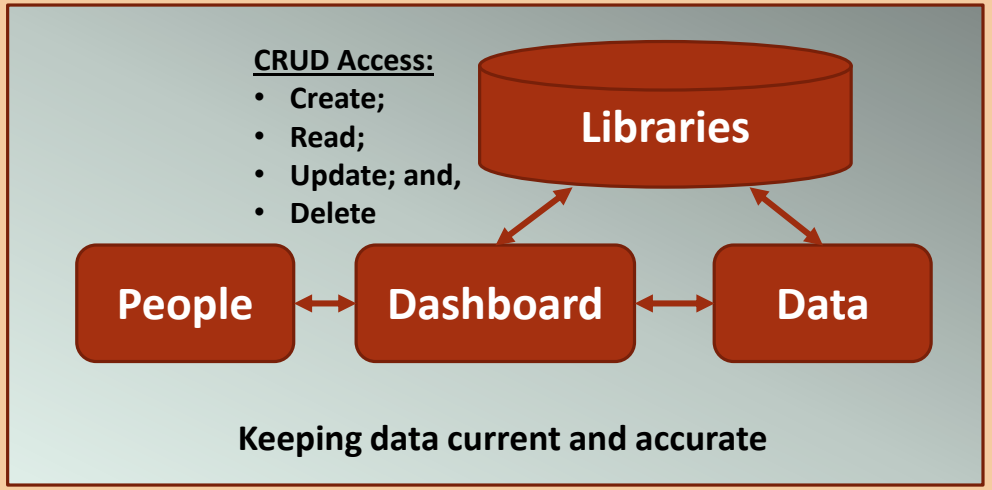
Utilizing Dashboards will

- Guaranty Accurate and Current Data;
- Viewable from any location at any time;
- Reduce the need for many conference calls and remote meetings;
- Improves efficiency;
- Reduces Costs.



- Providing a Dashboard between personnel and data will insure that current data is being displayed when needed;
- View data at remote meetings and conference calls from anywhere at anytime;
- Allow data to be updated as appropriate during meetings and then saving the updated data via Version and Release Management Guidelines will insure that all data is in sync and improve confidence in data accuracy and currency;
- Allow Drill-Down to current activity for a task being performed;
- Provide direct connection to person performing the actual task (i.e., Name, Title, Phone, Email, and IM for instant messages and screen viewing – Outlook based); and,
- Most efficient method for coordinating projects and real-time activities.

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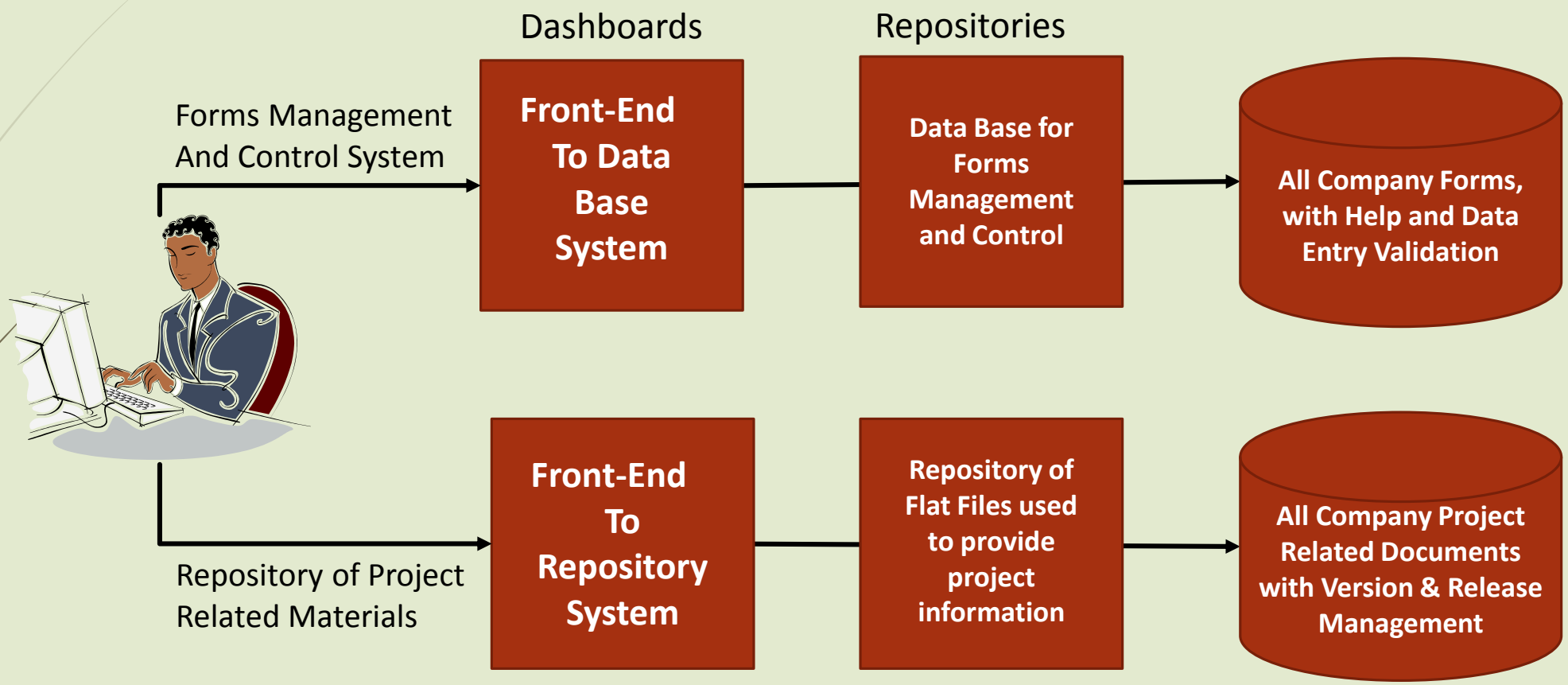
Building Dashboards for everything



Users can access the information at anytime and from anywhere, reducing the need for remote meetings and conference calls. Information can be drilled-down to actual task being performed and connect you with the person doing the work (IM, Name, Phone, Email, etc.). Only authorized personnel can update information, but everybody can access it, which allows for current and accurate information to be available upon demand.

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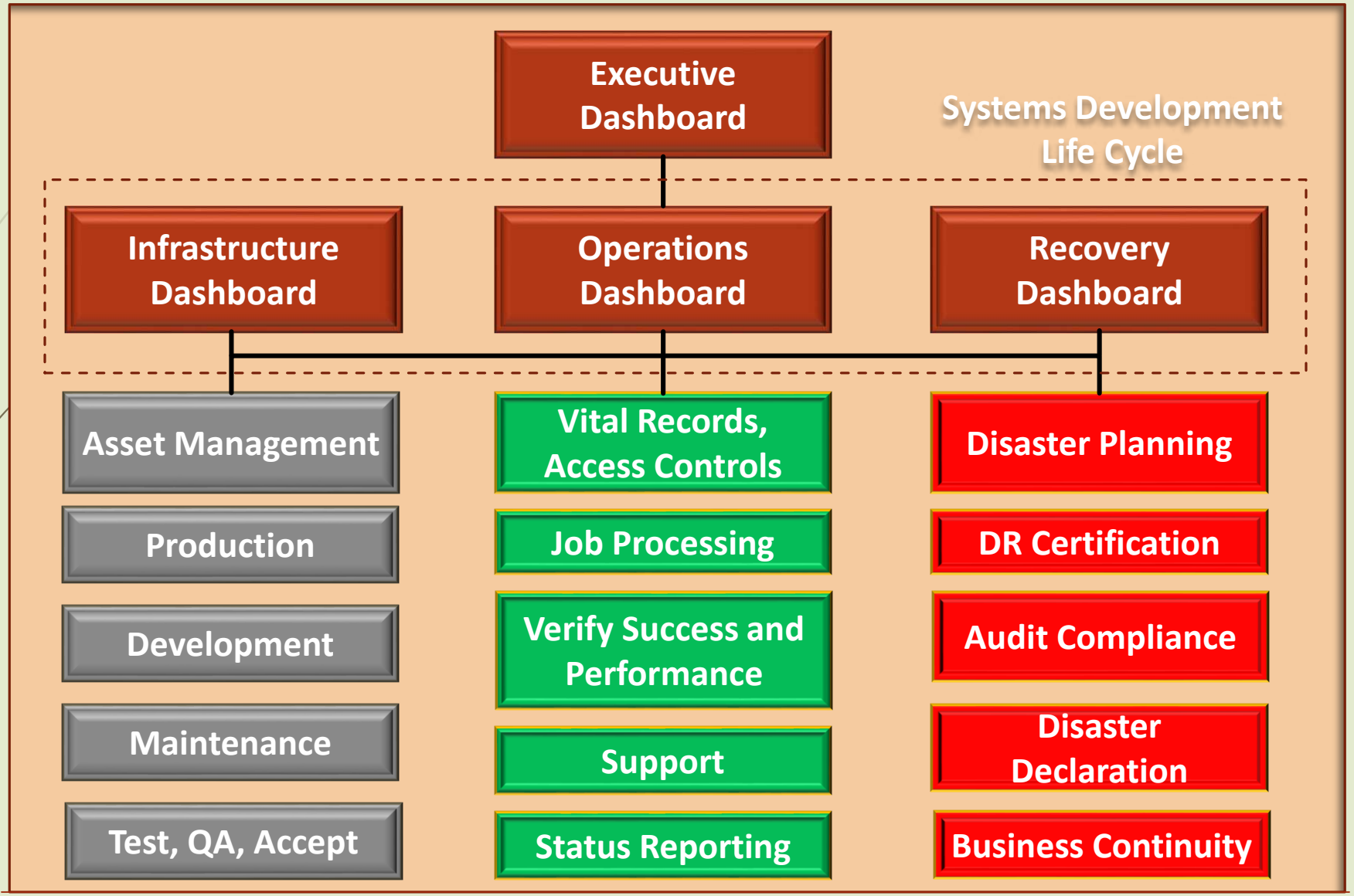
Executive Dashboard



Design and build to fit your needs

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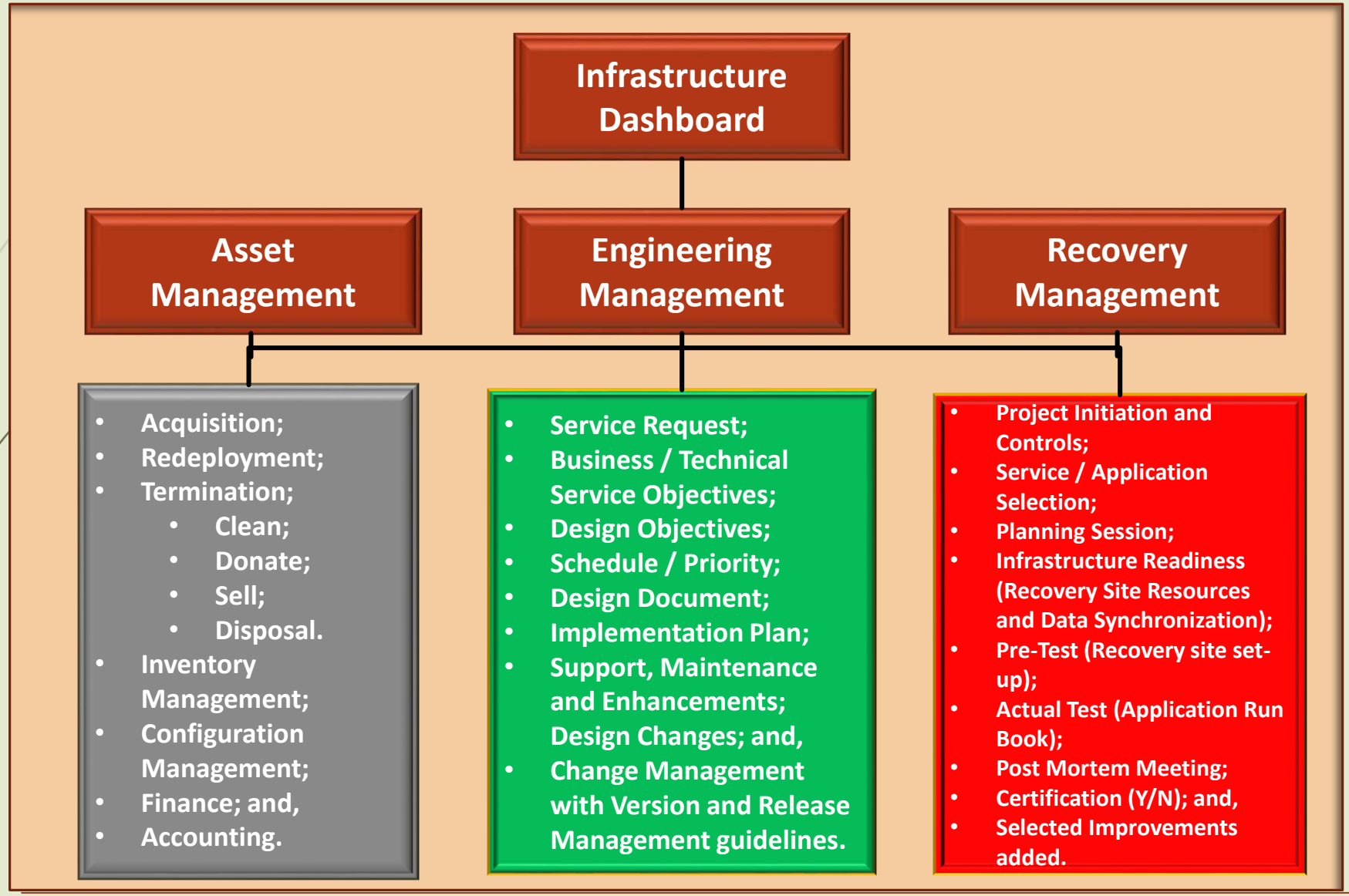
Infrastructure Dashboard



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Asset Management Lifecycle Dashboard

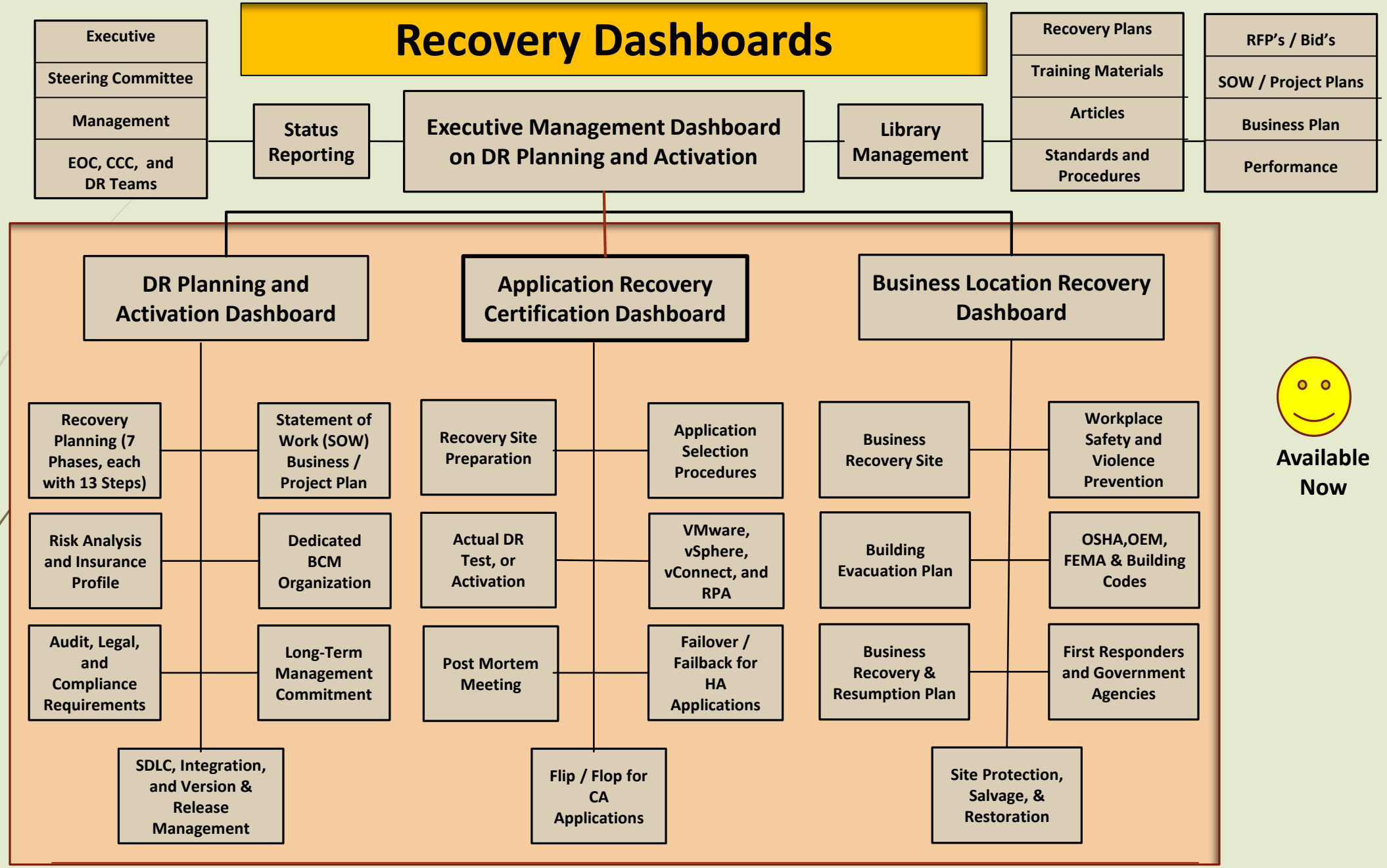
Assets can be: People, Equipment, Locations, or any resources that goes through an Acquisition, Redeployment, Termination cycle (which is most everything in your company). Tying them together into a WO/PO fashion allows tracking.

Asset Management Lifecycle Dashboard													
Work Order:	PO #:	Category:	Function:	Design:	Technical:	Asset Lifecycle Phase							
Owner WO #:	Resource PO #:	Acquisition:	Order:	Architecture:	Engineering:	Ordering:	Receiving:	Infrastructure:	Inventory:	Configuration:	Location:	Finance:	Accounting:
			Y/N	System Design	Equipment	Vendor	Date	Install	Add Entry	Add Entry	Installed at	Costs	Charge to
Owner WO #:	Resource PO #:	Replyment:	Clean (Company):	Architecture:	Engineering:	Ordering:	Receiving:	Infrastructure:	Inventory:	Configuration:	Location:	Finance:	Accounting:
			Y/N	System Design	Equipment	Vendor	Date	Uninstall	Update Entry	Update Entry	Update Entry	Costs	Charge to
			Y/N	System Design	Equipment	Vendor	Date	Warehouse	Update Entry	Update Entry	Update Entry	Costs	Charge to
			Y/N	System Design	Equipment	Vendor	Date	Move	Update Entry	Update Entry	Update Entry	Costs	Charge to
			Y/N	System Design	Equipment	Vendor	Date	Install	Update Entry	Update Entry	Update Entry	Costs	Charge to
Owner WO #:	Resource PO #:	Termination:	Clean (DoD):	Architecture:	Engineering:	Ordering:	Receiving:	Infrastructure:	Inventory:	Configuration:	Location:	Finance:	Accounting:
		Donation	Y/N	System Design	Equipment	Vendor	Date	Uninstall	Add Entry	Add Entry	Installed at	Costs	Charge to
		Sale	Y/N	System Design	Equipment	Vendor	Date	Warehouse	Add Entry	Add Entry	Installed at	Costs	Charge to
		Disposal	Y/N	System Design	Equipment	Vendor	Date	Move	Add Entry	Add Entry	Installed at	Costs	Charge to
		Redeploy	Y/N	System Design	Equipment	Vendor	Date	Move	Add Entry	Add Entry	Installed at	Costs	Charge to

Available Now

- **Tracks Asset from Acquisition, through Redeployment, and Termination;**
- **Relates activity to Work Order (WO) and Purchase Order (PO) to facilitate cost accounting;**
- **Defines Resources as Owned, Leased, Rented, Employee, Vendor, or Contractor for account and finance;**
- **Interfaces with Users, Resources, Locations, Finance, and Accounting; and,**
- **Provides easy tracking of required resources to determine their impact of delivery schedules.**

Recovery Dashboards



Available Now

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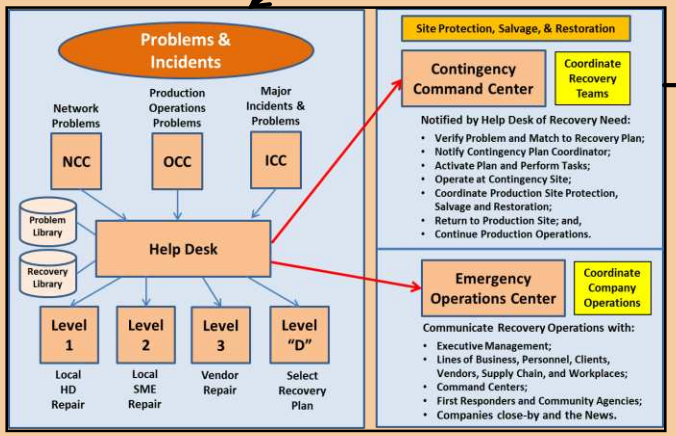
Tracking Active Disaster Recovery Events – Drill Down Actions

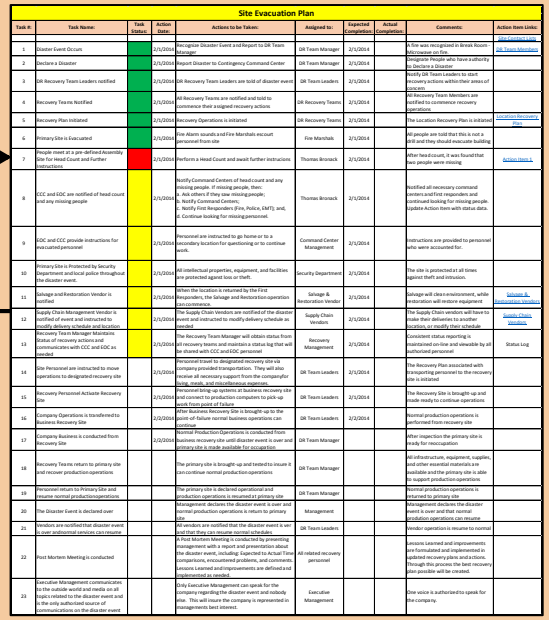
"Top Level" – Enterprise Resiliency and Corporate Certification Dashboard

Phase VI - Initiate Recovery Plan when Disaster Event Occurs												
Help Desk Identifies Disaster Event or a Disaster Event is reported to Help Desk	Help Desk Notifies Contingency Recovery Plan Coordinator	Contingency Coordinator Declares Disaster and Initiates Plan	Team is Called and Recovery Tasks Performed	Failing Site Protection, Salvage, and Restoration is Initiated	Disaster Site is Evacuated, as needed	Recovery Personnel are Transferred to Recovery Site	Recovery Operations are Initiated and Conducted for Life of Disaster	Failing Site is Salvaged and Restored	Personnel Return to Original Site and Resume Production	Post Mortem is Conducted and Improvements Identified	Improvements are Incorporated in Future Recovery Plans	Recovery Steps are added to Testing Process and Periodically Repeated

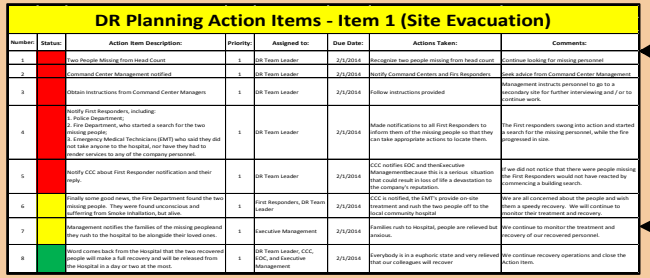
"Sub Level"



"Activity Level"



"Action Item Level"



"Management & Control Level"

Contingency Command Center (CCC) | Emergency Operations Center (EOC)

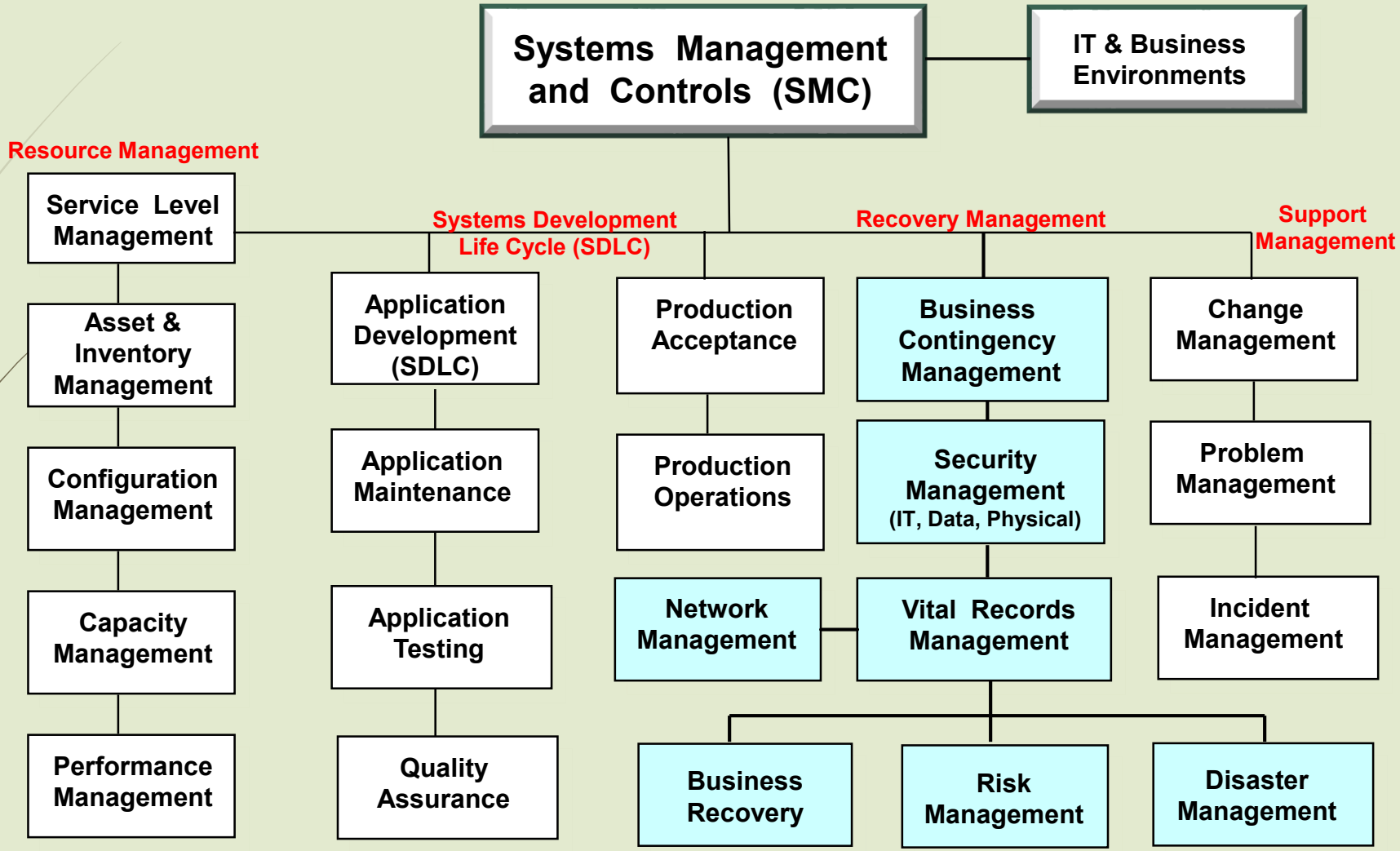
Available Now

Other Ways to utilize a Dashboard concept include:

Other Benefits to be derived

- Systems Development Life Cycle (SDLC) Forms Management and Control;
- Tracking SDLC Activities through Forms Management;
- Utilizing a Work Order (WO) / Purchase Order (PO) tracking system for cost accounting and charge back;
- Personnel Productivity and Training; and,
- Work Flow Management System

Systems Management Organization

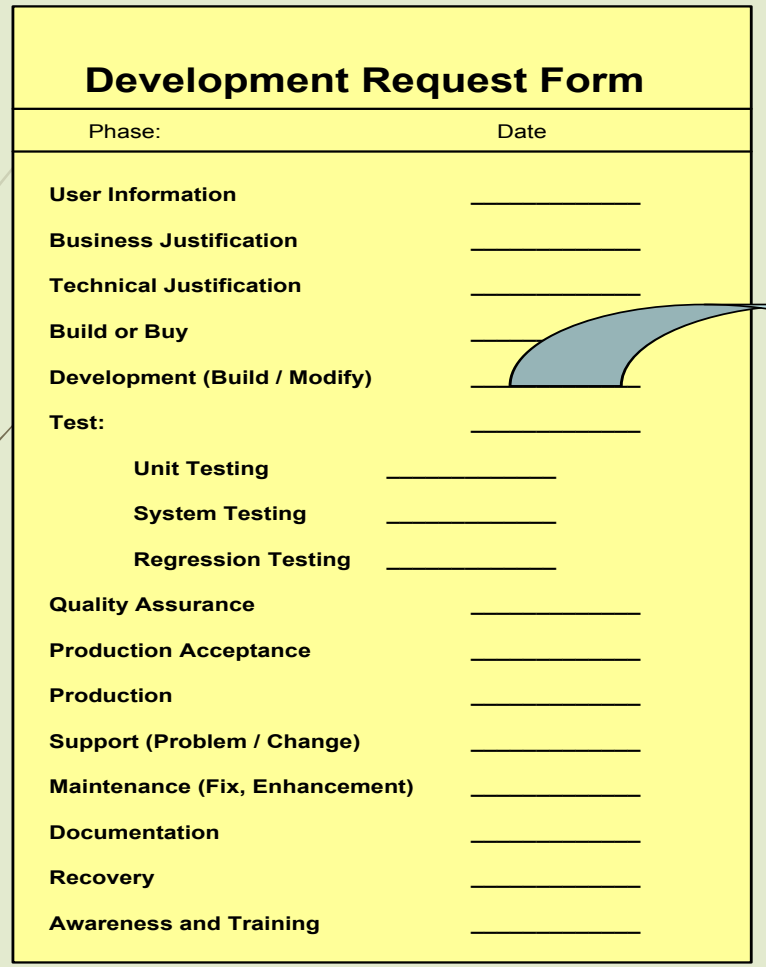


Implement this Organization

Functional Responsibilities defined, Job Descriptions, Orientation & Training, Required Documentation (S&P, Manuals, etc.)

Job Documentation Requirements and Forms Automation

New Product / Service Development Request Form Life Cycle



Main Documentation Dashboard

Documents are Linked to from Date Field

Link to Documents

Documentation

Development:

- Development Request Form Number
- Business Need
- Application Overview
- Audience (Functions and Job Descriptions)
- Business / Technical Review Data
- Cost Justification
- Build or Buy Decision
- Interfaces (Predecessor / Successor)
- Request Approval

Documentation

Testing:

- Data Sensitivity & Access Controls
- IT Security Management System
- Encryption
- Vital Records Management
- Data Synchronization
- Backup and Recovery
- Vaulting (Local / Remote)
- Disaster Recovery
- Business Recovery

Documentation

Quality Assurance:

- Application Owner
- Documentation & Training
- Application Support Personnel
- End User Coordinators
- Vendors and Suppliers
- Recovery Coordinators
- Testing Results

Documentation

Production Acceptance

- Application Setup
- Input / Process / Output
- Messages and Codes
- Circumventions and Recovery
- Recovery Site Information
- Travel Instructions

Sub-Documentation Menus

Implement this Technique

Information Accounting and Charge-Back System Concept

By utilizing Work Order (WO) and Purchase Order (PO) concepts, it is possible to track and bill clients for their use of Information Technology services associated with development and maintenance services. This concept is presented below:

User Name: _____ User Division: _____ User Identifier _____

Work Order #: _____ Date: _____ For: _____

Purchase Order Phases:

PO for: **Development, or Maintenance**	Cost: $ _____
PO for: **Testing**	Cost: $ _____
PO for: **Quality Assurance**	Cost: $ _____
PO for: **Production Acceptance**	Costs $ _____
PO for: **Production (on-going)**	Cost: $ _____
PO for: **Vital Records Management**	Cost: $ _____
PO for: **Asset Management (Acquisition, Redeployment, Termination)**	Cost: $ _____
PO for: **Inventory and Configuration Management**	Cost: $ _____
PO for: **Information and Security Management**	Cost: $ _____
PO for: **Safe Workplace Violence Prevention**	Cost: $ _____
PO for: **Recovery Management**	Cost: $ _____
PO for: **Documentation and Training**	Cost: $ _____
PO for: **Support and Problem Management**	Cost: $ _____
PO for: **Change Management**	Cost: $ _____
PO for: **Version and Release Management**	Cost: $ _____

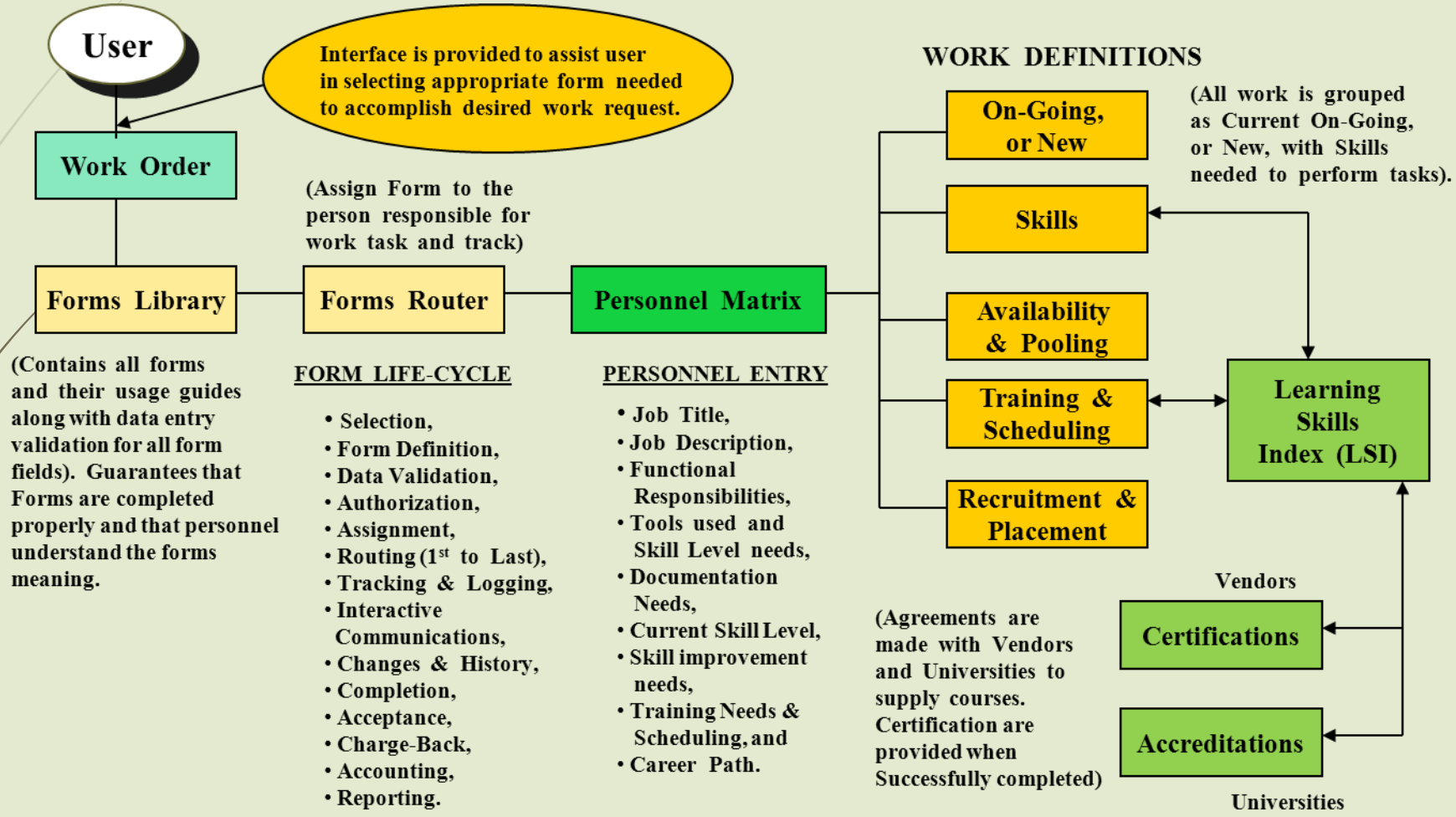
Total Cost: $ _____

Implement this Charge-Back System

Bill can be generated via Forms Management, Time Accounting, or Flat Cost for Services. This system can be used to predict costs for future projects and help control expenses and personnel time management.

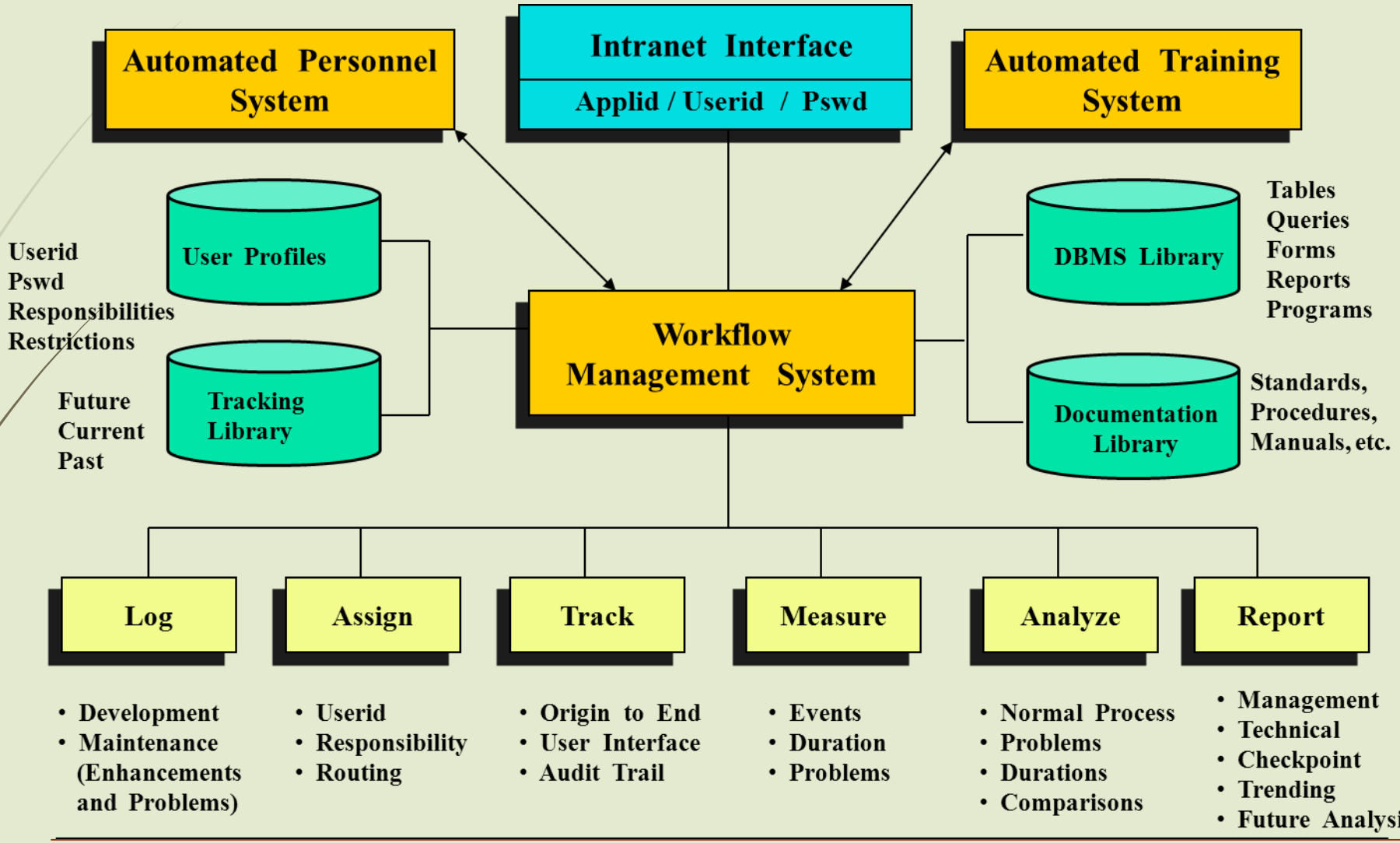
Personnel Productivity and Training

(Responsible for assigning work tasks to the right person at every project phase, while ensuring that skill requirements are met and the highest possible quality is achieved)



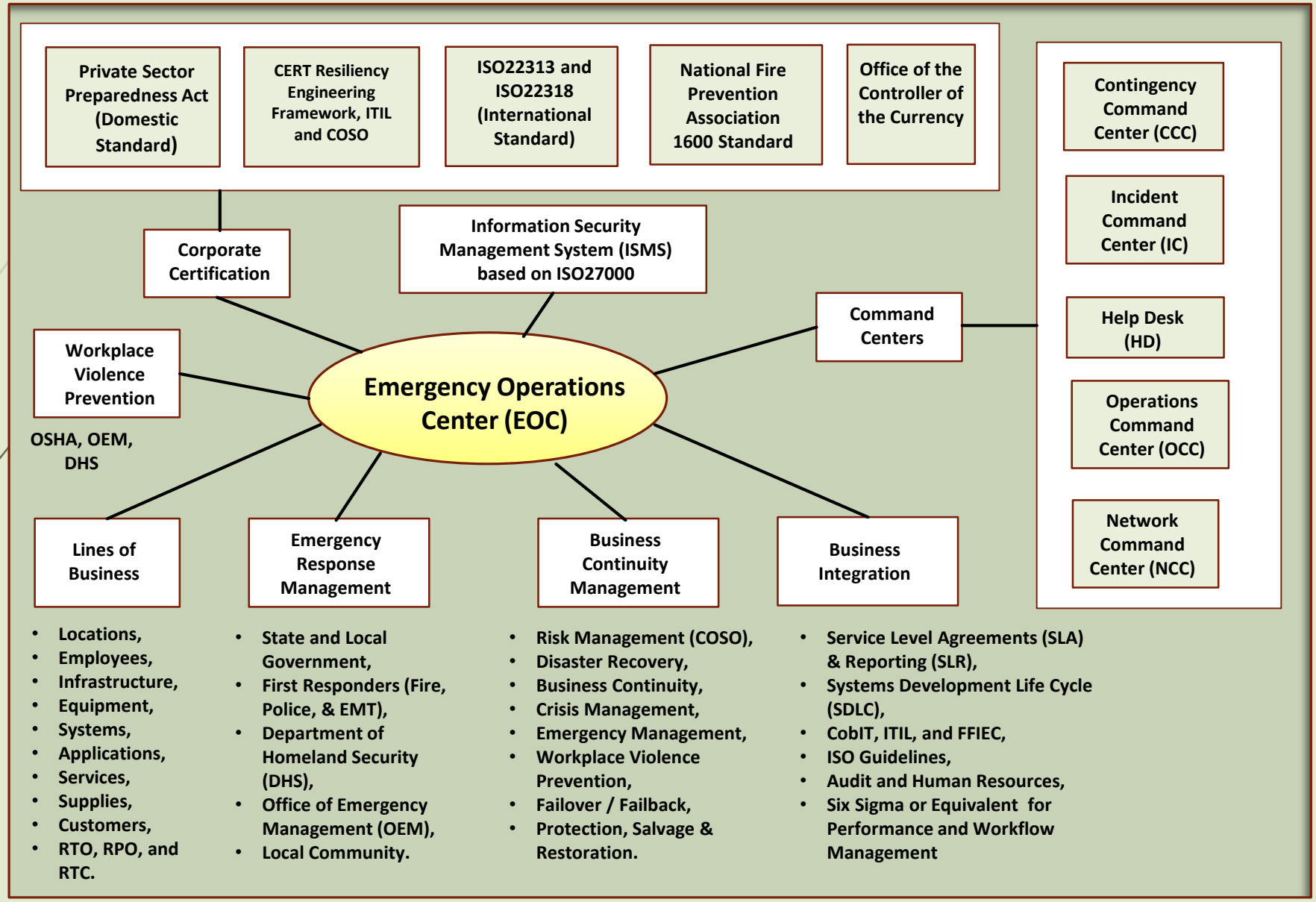
Implement this Personnel Productivity System

Personnel and Work Flow Management



Implement this Work Flow System

Fully Integrated Resiliency Operations and Disciplines (Logical End Goal)



How do we get there

- **Start with defining your SDLC and all forms used within the system:**
  - Implement a Forms Management and Control System;
  - Create a Mechanism to help personnel select the right Form for what they have to do which will insure that all Forms are of the same type and format and facilitate your being able to develop metrics based on the information contained in Forms;
  - Make sure all Forms have a "Help Screen" to explain their use and meaning;
  - Use "Field Validation Rules" to make sure all required data is entered correctly;
  - Insure that a Forms Tracking System is used from Origination through Completion; and
  - Utilize Performance Management to monitor work duration between estimated and actual.
- **Integrate this system with:**
  - Asset Management (Inventory, Configuration, Infrastructure, Personnel, etc.);
  - Production Operations (OCC, NCC, HD, Library Management, Access Controls, Back-up, etc.);
  - Utilize VMware type products to support Code Level Upgrades, Testing, and Recovery Management as part of the SDLC Test / Maintenance Phase to insure production is not interrupted;
  - Insure that Version and Release Management guidelines are adhered to in order to guaranty that documentation is at the same level as the products being delivered;
  - Provide personnel with Orientation, Awareness, Training, Certification, and Career Path support; and,
  - Connect all current and accurate information to Dashboards for easy access and management.

Now what will we have achieved?

- A fully implemented Systems Development Life Cycle (SDLC);
- A defined Systems Management Organization;
- A Work Order / Purchase Order Flow and Charge-Back System;
- An implemented Enterprise Resiliency and Corporate Certification environment;
- An Executive Dashboard and Implemented Dashboard Relationships with Drill-Down capabilities;
- Working Example of a current Dashboard used to support Application Recovery Certification Management (already completed);
- Personnel Productivity and Training System;
- Utilizing VMware, vSphere, vConnect, and Recovery Point Application to support rapid recovery in support of critical applications and sites;
- Integration within the Enterprise Environment;
- Emergency Operations Center (EOC) Support Organization, with interfaces to Command Centers and Lines of Business;
- Better able to Respond to Disaster Events in support of Business Continuity; and,
- Productivity Improvement Benefits are gained through this approach.

How Dashboards Help

- Improved efficiency by providing instant access to current and accurate information from any authorized terminal or personal computer, at anytime from anyplace;
- Drill-Down capability allows viewer to get to actual task being performed and be provided with the contact information for the person performing the task;
- Less time spent reviewing out-of-date or inaccurate information reduces chaos;
- Improved time frame for completing projects due to fewer remote meetings;
- Reduced costs associated with implementing projects due to fewer conference calls and more time to devote to actual work;
- Better protection to the company reputation;
- More highly trained staff with an improved morale, that are easier to retain and aid in the ability to recruit additional staff and new clients;
- Adherence to the laws and regulations where the company conducts business; and,
- Less stress and better performance helps everyone do their job better.

The Next Step

- If you believe that this approach can help your company improve performance and bring products and services to market more rapidly, then contact Thomas Bronack at:
  - Thomas Bronack
  - Phone: (917) 673-6992
  - Email: bronackt@dcag.com
- I would love to assist you in integrating this approach within your environment.
- Remember, this approach uses your existing data so you do not have to change information to adopt to this product.