

**When is Technology Support Not About Technology
A Checklist for TA Providers**
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1. Leadership
 - a. Who is your Client (i.e., who is actively involved in contracting and regular communications with you)?
 - Volunteer (1)
 - External Vendor (assumes no decision-making authority) (2)
 - Admin / tech staff (no decision-making authority) (3)
 - IT / Technology director (management level) (4)
 - Program Director / non-technology management level position (5)
 - Executive Director (6)
 - b. Rate the executive director's overall involvement in technology-related matters at the organization.
 - Technology-phobic; won't support technology; doesn't "get it" (1)
 - Wary; might be interested, mostly a "prove it to me" mentality (2)
 - Claims to get it but actions do not match words (i.e., does not commit sufficient resources) (3)
 - Hands-off delegation; commits resources as long as someone else is responsible for it (4)
 - Engaged delegation; participates in meetings; provides vision; commits sufficient resources (5)
 - c. Rate the executive director's involvement with you, the consultant.
 - Not involved at all; contract being handled by a subordinate (1)
 - Involved in discussions about contract, but contract being managed by a subordinate (3)
 - Leading contract discussions & actively engaged in progress of contract; consultant reports to director (5)
2. Institutionalization
 - a. Rate how well computer technology is integrated into the operations of the client organization. The organization...
 - has no computer technology (1)
 - has computer technology but hardly ever uses it (2)
 - uses computer technology minimally (word processing, some finance) (3)
 - uses technology fairly well (above plus human resources, email) (4)
 - uses technology very well (above plus info. management, client mgt., communications, etc.) (5)
 - is on the cutting edge of innovative use of technology in support of their mission. (6)
 - b. Rate how well Internet communications are integrated into the client's operations. The organization...
 - has no Internet access (1)
 - makes minimal use of the Internet (some email, little-or-no web activity) (2)
 - uses the Internet fairly well (staff email accounts, basic web site, web for research, etc.) (3)
 - uses technology very well (actively uses email to engage constituency/ target audience; web site regularly updated; Internet use is an integral part of organization's external and internal communications) (5)
 - is on the cutting edge of innovative use of the Internet in support of their mission (6)
 - c. Rate the overall staff culture related to technology and/or the Internet:
 - I don't know; I haven't asked (0)
 - Technology / Internet use is completely separate from programmatic activities (1)
 - Staff are neutral towards technology / Internet; i.e., "prove its relevance to my work" (3)
 - Staff fully "get it," and using technology regularly in programmatic and admin. work (5)
 - d. Describe the staffing for technology at this organization.
 - No one focuses on technology in any way (0)
 - A volunteer or intern maintains the organization's technology (1)
 - The organization outsources (to a consultant or service) all things related to technology (2)
 - Technology support is part of a staff function that also has non-technology responsibilities (3)
 - The organization has at least one full-time IT/Technology support person (non-management) (4)
 - The organization has a senior, management-level IT director (5)
 - e. Is there an IT team?
 - No (1)
 - Yes, but the team has little-to-no influence on decision-making (3)
 - Yes, and the team has influence on decision-making authority (5)

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3. Challenge / Solution Identification

- a. What is the *presenting* issue? (Why did they call you in? What was the initial request?)
- Fix something that is broken (1)
 - Train staff in a particular application or activity (2)
 - Design a customized application / solution (including a web site) (3)
 - Provide ongoing support (3)
 - Assess the needs of the organization, then *you* deliver the solution (4)
 - Assess the needs / resources of the organization, then work with the client to design a solution that *they* implement *internally* (5)

Describe the *presenting* issue:

- b. What activities will you engage in with your client to better understand the presenting issue?

- c. What types of organizational / human behavior change will be required to implement the technology successfully?

4. Client – Consultant Relationship

- a. How does the client engage you?
- S/he never returns my phone calls (1)
 - Getting answers from him/her is like pulling teeth (2)
 - S/he expects me to complete my work without much engagement with his/her staff, including him/her (2)
 - S/he lets me have full reign (rein?) with his/her staff (3)
 - We communicate and problem-solve together on a regular basis (4)
 - We communicate and problem-solve together on a regular basis AND our working partnership has a clearly defined, 50/50 sharing of engagement in the process (5)

- b. How much responsibility is the client willing to take for the success of the contract?
- It is my understanding that I *should* be 100% responsible for the success of this project (1)
 - None; I'm fairly certain that either I or a member of the client's staff will be the "fall guy" if this project does not meet the client's needs / expectations (2)
 - The client accepts some responsibility for the success of this project but expects me to be the primary one responsible for its success (3)
 - The clients accepts some responsibility to the success of this project but expects members of his/her staff to bear most of the responsibility for the success of this project (4)
 - The client completely owns the success of this project and is actively engaged in contributing to its success (5)

- c. How do you as a consultant feel about this client / contract?
- I am certain that *I know* exactly what they need (although they may not) and I'm the one to deliver it (1)
 - I continue to be unclear about just what it was they want from me (2)
 - I have a nagging suspicion that any solution I provide will not get implemented / continued after I'm gone (3)
 - I am confident that the client and I are clearly on the same page (4)
 - I experience a healthy skepticism and regularly check out my assumptions with my client (5)

- d. What red flags did you feel during your first conversation with the client?

- e. What is the status of those red flags now (or at the end of the contract)?

Add up the numbers for each of the items you selected. My premise is that the higher the total number is, the more likely the client will experience a positive outcome with their technology initiative. The lower the total number is, the more likely the client will not succeed at achieving the results they hope to accomplish, and the less likely you as a consultant will achieve successful results with your client.

What's your experience?