Mike Sisco / MDE Enterprises

IT Manager Series - Free Samples Gift

www.mde.net

This is a free gift from Mike Sisco, owner and founder of MDE Enterprises.
You are encouraged to pass it along to others.

MDE Mission Statement:
*"provide practical insight and tools that
help IT managers of the world achieve more"*

Best of success !

Introduction

One of the best parts of my business is being able to give to others. Granted, my business depends upon selling MDE products and services, but we often find ways to give. One item is our free newsletter, ***Practical* IT Manager Tips**. Past articles are at www.mde.net/ezine.

The contents of this FREE GIFTS package includes samples from many of the books written as part of my **IT Manager Series**. Additional information on our IT Management Series ebooks is listed below:

IT Manager Development Series - the original ten books written to provide practical insight into managing technology resources effectively. www.mde.net/cio

- IT Management-101: fundamentals to *achieve more*
- Building a Strategic IT PLan
- Building a Successful IT Organization
- IT Project Management
- Developing an IT Business Plan
- IT Asset Management
- IT Staff Motivation and Development
- Acquisition: IT Due Diligence
- Acquisition: IT Assimilation
- What To Look For in a CIO

IT Manager ToolKit - After writing the books in the development series, I decided to document my management tools that had been so helpful to me in organizing, monitoring, and managing technology resources for over 20 years. The ToolKit includes 80 management tools designed specifically for IT managers. www.mde.net/cio/page13.html

Technology Cost Saving Strategies - In my first IT Manager Institute, I wanted to provide insight that would help each participant identify enough cost savings in their company to more than pay for their class fee and travel when they returned to their companies. This book includes 50 cost saving strategies that I've used to save millions of dollars in companies over the years. www.mde.net/strategies

Practical IT Policies and Procedures - This book provides a process to use to develop your own policies and procedures and includes 23 sample policies that you can use "as is" or modify for your specific needs. www.mde.net/policies

IT Management Models - From the very beginning of writing IT management material, I wanted to develop this book. This publication is a truly unique and fun approach in discussing IT management concepts and issues. When you read **Bite the Head of a Frog**, you will understand the fun approach I use in delivering an important message. You will also be much more likely to remember the material due to the visual models developed for this work. There are 72 models organized in 6 management disciplines. www.mde.net/models

Mike Sisco's IT Management Articles Collection - This is a collection of over 100 articles written for my newsletter from April 2002 through December 2003. www.mde.net/articles

Contents

Technology Cost Saving Strategies

Sample #1 - Telecom (data)

4. Telecom (data)

Description: Systems connectivity costs including WAN (wide area network) circuits, T1 type services, and other telecom services used for remote office connectivity.

Category: Direct

Identifying: Conduct an inventory of all telecom expenses from your telecom carrier invoice.

Quantifying: Total up the circuits/lines that are no longer in use or that can be eliminated along with the savings potential you have by reducing the bandwidth of certain remote office services but that still provides adequate response time.

Investment: No

Tips: Savings opportunity lies in:

1. Lines, circuits no longer used or needed.
2. Ability to consolidate remote operation services
3. Ability to reduce bandwidth while maintaining acceptable processing speeds

Top 50 Technology Cost Saving Strategies

Achieve more

Technology Cost Saving Strategies

Sample #2 - Automate clerical processes

11. Automate clerical processes

Description: Eliminate clerical work by automating tasks and processes performed by low skill workers.

Category: Indirect, productivity

Identifying: Review all clerical processes, typically in handling paper, data entry, production line processes, etc.

Quantifying: Define the automation opportunity and estimate the people savings possible by automating the process or task. Include employee benefits factor and other employee related expenses such as recruiting, training, administrative costs, etc.

Investment: Yes, typically programming or process control equipment and implementation

Tips:

- Gain support from upper management and especially the Department Head of a targeted area
- Clerical workers usually have high turnover rates so eliminating positions can be accomplished through attrition rather than "downsizing"

Top 50 Technology Cost Saving Strategies

Achieve more

Technology Cost Saving Strategies

Tools excerpt - Strategies Tracking Checklist Tool

Technology Cost Saving Strategy Checklist

Date: ____________ p1

Owner: ____________________

	Cost saving strategy	Responsibility	Target Date	Estimated Savings	Actual Savings
1	Payroll				
2	Recruiting				
3	Consulting / contractor fees				
4	Telecom (data)				
5	Hardware & software maintenance				
6	Software license fees				
7	Travel				
8	Eliminate paper				
9	Postage				
10	Projects without ROI				

***Practical* Policies and Procedures**

Sample #1 - Password Security

Information Technology Department

Policies and Procedures

MDE Enterprises

No: IT_03

Policy Name: Password security

Objective:

Provide guidelines in appropriate management of business passwords to maintain adequate security and integrity of all of the company's business systems.

Applies to:

All employees

Key guidelines:

Maintaining security of the company's business applications, software tools, email systems, network facilities, and voice mail are critical to providing data integrity and stability of our systems. Passwords are provided to limit access to these company assets on an as needed basis.

- The company provides access to network, electronic mail and voice mail resources to its employees in support of the company's mission. Passwords are assigned for access to each of these resources to authenticate a user's identity, to protect network users, and to provide security.
- It is the responsibility of each individual to protect and to keep private any and all passwords issued to him/her by the company.
- The IT Department will establish guidelines for issuing new passwords, deleting passwords as required, and allowing employees to change their passwords.
- Although the company strives to manage a secure computing and networking environment, the company cannot guarantee the confidentiality or security of network, e-mail or voice mail passwords from unauthorized disclosure.
- New employee passwords and changes must be requested by a Manager. This helps monitor and manage the importance of protecting passwords in their distribution and use in such a way that reinforces the integrity of users accessing company systems.
- A network manager must approve any password change requested by a user's supervisor. Confirmation will be sent to user when a password change is completed at the request of a supervisor.

- IT Customer Support will handle requests from company managers made in one of the following ways:
    - Requests may be made in person from 7:00am to 5:00pm Monday-Friday.
    - Requests may be faxed to (555) 555-5555.
    - Requests may be submitted via Intranet web form.
    - Password account requests must be verified by the employee's manager.
- The IT Department will delete all passwords of exiting employees upon notification from Human Resources.
- System administrators and users assume the following responsibilities:
    - System administrator must protect confidentiality of user's password.
    - User must manage passwords according to the Password Guidelines.
    - User is responsible for all actions and functions performed by his/her account.
    - Suspected password compromise must be reported to Customer Support immediately.

Password Guidelines

Select a Wise Password

To minimize password guessing:

- Do not use any part of the account identifier (username, login ID, etc.).
- Use 8 or more characters.
- Use mixed alpha and numeric characters.
- Use two or three short words that are unrelated.

Keep Your Password Safe

- Do not tell your password to anyone.
- Do not let anyone observe you entering your password.
- Do not display your password in your work area or any other highly visible place.
- Change your password periodically (every 3 months is recommended).
- Do not reuse old passwords.

Additional Security Practices

- Ensure your workstation is reasonably secure in your absence from your office. Consider using a password-protected screen saver, logging off or turning off your monitor when you leave the room.

Samples:

None

For questions, call:

For questions or comments, please call your IT Department at Ext. 5555.

Last revision date:

December 12, 2003

Practical Policies and Procedures
Sample #2 - Internet Usage

Information Technology Department

Policies and Procedures

MDE Enterprises

No: IT_02

Policy Name: Internet usage

Objective:
Provide appropriate guidelines for accessing and utilizing the Internet through the company's network.

Applies to:
All employees with authorized access to Internet services

Key guidelines:
Internet services are authorized to designated employees by their manager to enhance their job responsibility. The Internet is an excellent tool but also creates security implications that the company must guard against. For that reason, employees are granted access only as a means of providing support in fulfilling their job responsibility.

General

- Internet accounts are approved for designated employees by their immediate manager to provide tools that assist in their work.
- Each individual is responsible for the account issued to him/her.
- Sharing Internet accounts or User-ID's is prohibited.
- Organizational use of Internet services must reflect the mission of the company and support the company's goals and objectives.
- These services must support legitimate, mission related activities of the company and be consistent with prudent operational, security, and privacy considerations.
- The CIO led Internet Steering Committee will take responsibility for all web site content (i.e., "the company web site") and format presentation to reflect the company's mission and in supporting company and departmental objectives.
- The Company has no control over the information or content accessed from the Internet and cannot be held responsible for the content.
- Any software or files downloaded via the Internet into the company network become the property of the company. Any such files or software may be used only in ways that are consistent with their licenses or copyrights.

Inappropriate use

- The following uses of company provided Internet access are not permitted:
  - To access, upload, download, or distribute pornographic or sexually explicit material
  - Violate and state, local, or federal law
  - Vandalize or damage the property of any other individual or organization
  - To invade or abuse the privacy of others
  - Violate copyright or use intellectual material without permission
  - To use the network for financial or commercial gain
  - To degrade or disrupt network performance
- No employee may use company facilities knowingly to download or distribute pirated software or data. The use of file swapping software on company computers and company networks is prohibited.
- No employee may use the company's Internet facilities to deliberately propagate any virus, worm, Trojan horse, or trap-door program code.

Samples:

None

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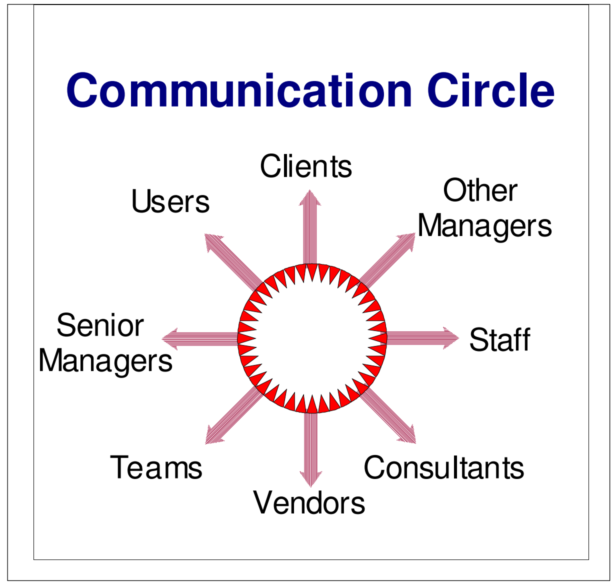
10. Communication circle



Description:
Communicating effectively is a key component for being successful as an IT manager. There are eight separate groups IT managers must deal with. Each has different sets of communication needs from the technology organization.

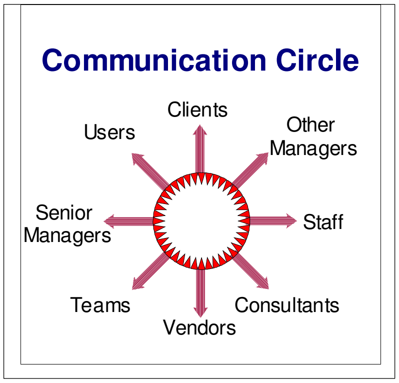
Learn to identify each group's needs and be proactive in communicating with them. It will enhance your effectiveness.

Communicating effectively is an important skill for an IT manager's success and can be a career difference maker.

Key points:
- IT has many groups to communicate with
- Each group has different needs
- All groups need follow-up, status updates, and how to work with you
- Communicating well enhances career opportunities
- Proactive communication defuses concern and confusion
- Communicate at the appropriate level for the audience

Category:
x IT Assessment
IT Strategy & Planning
x IT Project Management and Processes
IT Organization and Staff
IT Financial Management
x IT Measurements and Communication

Discussion:



An IT manager must deal with many groups of people. Every group is unique with different needs from the IT organization. The most successful managers are excellent communicators and have the ability to provide what each group needs to work effectively with his/her IT organization.

Develop processes that help you communicate with the groups on the Communication Circle. Proactive communication is not always easy for an IT manager, especially one who comes from a strong technical background. Formalized status meetings, reports, and processes that keep people "in the light" about what's going on will make your work easier and will enhance client satisfaction.

IT has many groups to communicate with - There are at least eight groups you must communicate with as an IT manager. Clients, Users, and Other Managers are at the top of the circle because they are your most important groups.

Each group has different needs - Every group has different levels of detail and informational requirements. Take the time to understand what each needs to provide the appropriate level of detail.

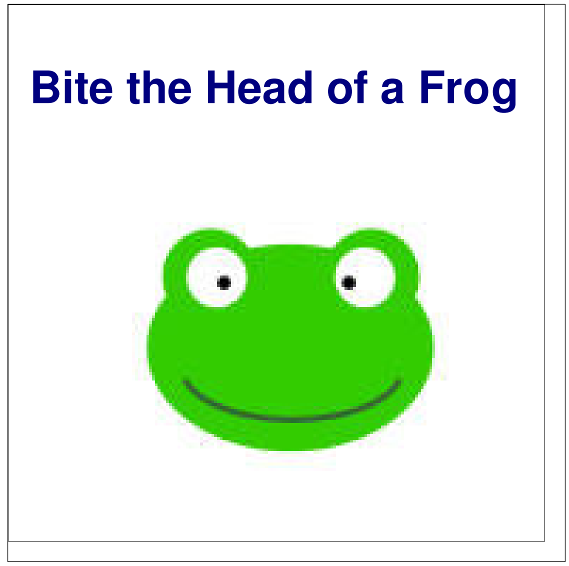
All groups need follow-up, status updates, and how to work with you - Every group needs your IT organization to follow-up consistently. They also need to know the status of technology issues and how best to work with your organization. Create status update processes to keep everyone in the loop as needed.

Communicating well enhances career opportunities - IT managers are often not very strong communicators. Learn to communicate well and put processes in place that facilitate the communication process and you will leverage your career opportunities.

Proactive communication defuses concern and confusion - Communicate proactively to reduce or eliminate questions, concern, and confusion. Strong managers learn how to be proactive in communicating with the various groups. It is a skill that defuses many problems and improves client and employee satisfaction.

Communicate at the appropriate level for the audience - Senior executives usually need minimal detail while employees and clients tend to need more. Construct your communication activities to give people what they need, but only what they need and not the full detail. Too much detail will lose the attention of many.

23. Bite the head of a frog



Description:

Tough issues and decisions often get put off until a "better time" to deal with them. When you have a painful or difficult issue to deal with, make it a point to go into the office and deal with the issue early or at a specific time, i.e., do the distasteful deed proactively and get it out of the way. You will find that it's less stressful for you and has a positive impact on your productivity as you won't be worried about the issue all day.

Take care of your most "distasteful" issue first and it clears the way for a better day.

Key points:

- Deal with the "ugly" issues early and avoid procrastination
- Address tough issues early in the day
- Evaluate consequences and prepare for the impact
- Plan for the event and get your act together
- Approach the issue with a win-win perspective

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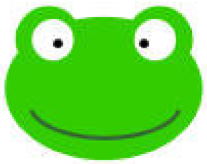
Bite the Head of a Frog



Most of us have this thing called a "procrastination factor". When we have a tough issue to deal with, we often put it off until the very last possible moment.

This burns up a tremendous amount of energy, creates a lot of stress, and lowers our productivity quite a bit because we can't stop thinking about the tough session we are about to have when we finally deal with our tough issue. There is a solution. Take care of your ugliest situation first thing in the day and get it out of the way.

Deal with the "ugly" issues early and avoid procrastination - Once you are prepared, tackle your toughest issues early and avoid procrastinating. Putting it off doesn't do anything but build up anxiety and cause you to lose focus on important issues of the day so handle the problem and move on.

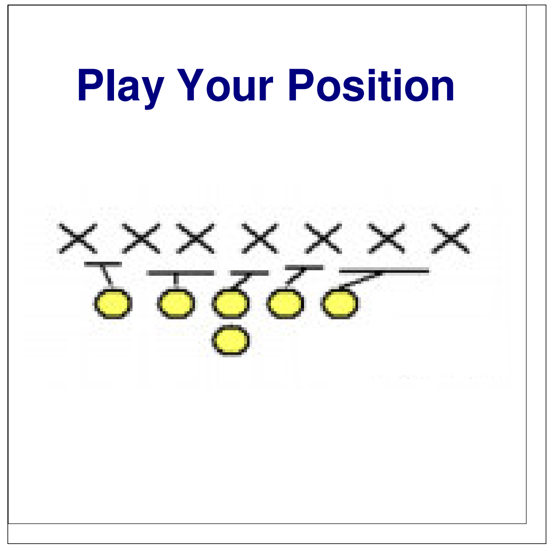
Address tough issues early in the day - Handling your toughest issues first thing will make you feel better that day. Think of it as "biting the head of the frog" being the worst thing you have to do that day. Go ahead, do it, and get past it so you can be productive the rest of the day.

Evaluate consequences and prepare for the impact - Once you determine how you need to handle a tough issues, it's best to go ahead and handle it. Be sure to evaluate the downside and possible ramifications so you go in prepared. In many cases, the toughest part is the anxiety that builds leading up to when you actually deal with the issue. If you have prepared well, handling the issue won't be as tough as you think.

Plan for the event and get your act together - Do whatever it takes to prepare. Seek help from those with experience in such matters and develop a planned approach. If it's a really tough employee or client issue, it's worth the time to prepare.

Approach the issue with a win-win perspective - Approach tough situations with a win-win attitude and seek a way for both you and the other party to find something positive with your solution. For example, if I have to fire someone for consistent unacceptable performance, I approach the issue in the perspective that I'm helping the employee move on to another career opportunity where he/she will be successful. It's unfair for the company, my team, myself, and especially the employee to allow him/her to continue working when he/she is not going to be successful.

38. Play your Position



Description:

In any organization, it is important for each team member to do their part to support the team and its mission. Playing your position means taking care of your responsibilities first and helping others when you can, but not when it causes you to neglect your assigned area of responsibility and creates risk for the team's success.

Key points:

- Stay focused to your assigned responsibility
- When we all execute individually, we succeed as a team
- Listen for the "audible" (responsibility changes made on the fly)
- Playing your position well creates teamwork
- Help others when your area is covered

Category:

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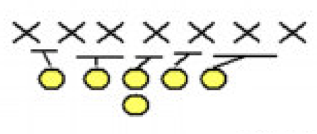
Discussion:

Play Your Position



It's very easy to slip into the habit of responding to whatever comes up on a daily basis. This is especially true if clear responsibilities and processes are not implemented that help your team members stay focused.

For a team to achieve its potential, clear responsibilities must be defined and each team member must be able to take care of his/her responsibility. If the manager has done a good job, the team will perform well when each team member handles his/her assignments effectively.

Performance breaks down if the responsibilities are not defined or if team members do not succeed in handling their responsibilities. Either of these issues can cause failure.

Success is achieved when:

1. Clear objectives are identified.
2. Specific responsibilities are assigned that will lead to success.
3. Each employee is trained and has the skills to handle assigned responsibility.
4. Each employee succeeds in his/her assignment.
5. Employees remain focused and do not abandon their assignments.

In this model, I use the "X's" and "O's" of a sample football team play diagram to get the message across. The objective is to protect the quarterback and move the ball forward. When everyone on the offensive line does his job by blocking his assigned defenders, the team will succeed.

The same principal works when focusing your IT team on projects or support responsibilities to meet your company's technology needs.

Stay focused to your assigned responsibility - "Misfire" in your assignment and you potentially cause the entire team to fail. Taking care of your assigned responsibility should be your first priority except when pulled off due to unusual circumstances.

When we all execute individually, we succeed as a team - Teams succeed when all parts are working in harmony. Focus attention in achieving your assignment and you help your team succeed.

Listen for the "audible" (responsibility changes made on the fly) - Business issues may require adjustments to what was initially planned. However, stay in sync with your IT manager and listen for specific changes that must be made.

Playing your position well creates teamwork - Team members earn respect when they handle their responsibility and assignments well in supporting the team.

Help others when your area is covered - Teamwork means "lending a helping hand", but not if it means leaving your assignment and risking failure for the entire team. Be sure to take care of "your business" first and help others out when possible.

IT Management Models

Tools Excerpt - IT Assessment Models Guide

IT Assessment Models

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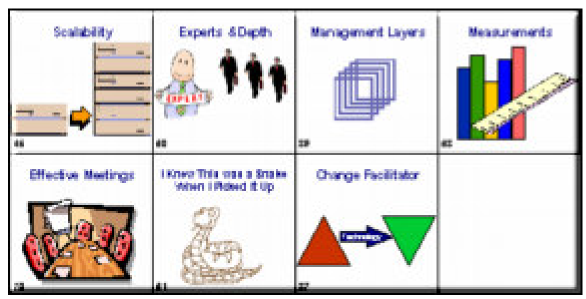


Mike Sisco's IT Management Articles Collection
Sample #1 - Resolving Client Satisfaction Issues

Resolving Client Satisfaction Issues

Have you ever had a notoriously bad client that you inherited or maybe one that just evolved into a bad situation. If you have a bad client, then step back a moment and take a deep breath. Any bad client situation is actually an opportunity in disguise. It may be hard to see the opportunity when you are mending the wounds but try to take the approach that there is a silver lining in there somewhere.

First a few comments:

- Don't settle with just your staff's perspectives.
- Apples are apples and oranges are oranges. You may not have either.
- Turning a bad client around is fun so think about the good times ahead.
- In over 90% of the time, there is a logical reason for the dissatisfaction.

Let's discuss this a bit. First, I suggest that you not take your staff's perspectives as fact. I've seen too many cases of a "bad client" being portrayed that way because the staff or manager doesn't know how to handle the situation. Before you write off any client, you should always inspect the situation until you are confident there is no reasonable solution to the problem. In my opinion, there are only rare cases where you can't turn a bad situation around.

Secondly, I mention that the two fruits are different. When you inspect a situation, you may find that what you have been hearing about a client situation is not at all the full picture. Many times you may be surprised to find that not only does the client have a legitimate reason for their dissatisfaction but that they are actually being more than reasonable toward you and your company. The key is to determine what the real issues are.

Third, helping someone is always fun, especially when they appreciate what you have done. Your client has no desire to be dissatisfied with your company's products or services. Solving the problem is helping both your client and your company and when you solve it, everyone takes notice. Like I said, fun times are ahead and opportunity can result from disastrous situations.

Lastly, almost every single client dissatisfaction situation I have seen had a logical reason underneath it. If you hear things like, "They don't know what they are doing." Or "They always break their system.", get ready to go fishing. General comments tend to tell you that the person making the comment doesn't actually know what the real problem is.
Okay, so what do you do if you have a terrible, unreasonable client?

Steps to take

A. **Determine the problem in specific terms** - Meet with the client with the purpose to determine in very specific terms what the problems are. Before you meet, do your homework and gain as much information as possible to help you understand the situation. DO NOT look for reasons why the client is in the wrong or ways to defend your company. Your purpose has to be very objective because the reality may be that your organization or company is actually causing the problem. Guide the client to discuss specific issues and not generalities. Every generality has to be converted into specific issues or thrown out for you to determine whether a problem truly exists.

B. **Quantify the issues** - At the end of your meeting (preferably) or at the latest the next day, quantify the issues by summarizing in as specific terms as you can what the client has stated to be the problems.

C. **Gain your client's agreement on the list of issues** - After you quantify the issues, ask the client if he/she agrees that those are the issues. Ask if there are any other issues that you've missed.

D. Gain your client's commitment - Ask the client for their commitment to what you want to see happen when you resolve the quantified issues. The desired outcome may be to gain a positive referral, to have the client pay an outstanding invoice from your company, or to purchase a new release of software. The bottom line here is that you need to quantify the positive result that the client takes when you solve the problems.

E. Do not solve it today - Bad situations don't get there over night. Solving them shouldn't be immediate even if you might be able to. The worst thing you can do is to do a "fire, ready, aim" and give the client a quick fix that ultimately does not solve the issue(s). It only deepens the problems and adds to the lack of credibility your client already has for you. Take your time to discuss the issue with others in the company and to develop a sound approach that works toward the ultimate goal before you deliver possible solutions to your client.

F. Follow-up in writing - Send your client a letter or e-mail as soon as possible that summarizes the meeting and lists the issues and client commitment that was agreed upon. In the letter, give the client the timeframe that you plan to provide a recommended solution to the issue(s).

G. **Develop a plan**

H. Develop a detailed plan that will address the issues identified by your client. The approach may require the client to pay more money for your services. If that's the right answer, don't hesitate to ask for more money; just be aware that until you establish some level of credibility, asking for more may be considered inappropriate, even outrageous. If the solution requires more cost to provide higher levels of client service, be sure you have a tight proposal that defines the reasons and what the additional costs are going to give the client.

I. Develop specific approaches to solve each issue and be specific.

J. Prioritize the initiatives. As much as possible, place a "quick winner" at the top to get off to a positive start.

K. Identify specific responsibilities of each party to achieve successful outcomes.

L. Quantify how you both will be able to determine when the issue is resolved.

M. Put it all in writing.

N. Deliver the plan and gain the client's agreement - "Don't leave home without it." What I mean is that you can't leave the client without an agreement to your proposal, even if you have to modify it slightly. Leave without the client's agreement and commitment and you might as well go ahead and "throw in the towel" because you will not succeed. Both of you have to be committed to a positive resolution and the plan that gets you there.

O. **Follow-up, Follow-up. Follow-up** - Make it a point to check on the "client turnaround initiatives" status every other day in the beginning to ensure all of your commitments to the client are taking place.

You may have to be the catalyst to make certain things happen, even with your own staff. Remember, your staff may believe that there is absolutely no way to please this client when the problem has actually been that your team has not really heard what the client is saying to them.

Sometimes it helps to have a bit of gray hair and the experience that goes with it. It's also easier to view a problem when you're not down in the midst of the battle; that's why the generals seek the high ground. Be certain to meet or beat every deadline or let the client know well ahead of time when there an unforeseen problem risks completing an initiative. No one likes to hear bad news but bad news delivered in advance allows you to plan for the impact it will have.

P. **Communicate often** - For a change, contact the client before he is expecting you to. Now is the time to be very proactive. Before you call, be sure you have the latest update on every outstanding issue and any new events that might affect your progress. Lack of communication is probably the greatest contributor of client dissatisfaction. All of us dislike uncertainty, having a need to depend on someone else to do our job and not knowing where they stand on an important issue, or not getting a response when we need their help. Get your client out of the dark and into the light and see the difference in their attitude toward you for yourself.

Final comments
A few comments that will help you as you work through a client turnaround process:

- Everyone likes to deal with nice people. Be nice and you may find your client can be nice as well.
- Be polite but firm. When you need the client to do his part, quantify it and expect it just as he should with you.
- Take charge. The client is looking for you to take the initiative and to lead the way.
- Be objective. The client is always right even if he is wrong. It's still up to you to manage his expectations properly.
- The worst case is that you lose the client. The world still turns if that happens.
- The best case is you develop a highly referenced client who buys more from you. THIS IS WHAT I WANT !!

Good luck and success in taking advantage of your "opportunities".

Mike Sisco's IT Management Articles Collection
Sample #2 - Empower your employees

Empower your employees

Sounds good but what really is “empowering” others?

We all want to do things well and to achieve success in business and in life. Your employees want to be as successful as you do.

Empowerment comes when you grant a “trust” in someone to do the job. The job may not get done in exactly the manner in which you would do it but think back when you were the employee versus the manager. You probably handled situations differently then as well.

Provide the employee guidance, coach them in areas that help them succeed, give them the tools they need to succeed, and support them in their efforts. The trick in managing is to loosen the controls to allow the employee to have the freedom to do the job but being able to recognize and prevent an employee from making a “big” mistake.

The more success you have, the looser the controls need to be. In a very short time, the employee sees the trust you have in his/her ability and recognizes the coaching and control as being there to help develop the individual—not to restrict their progress.

We all respond positively to someone who has trust in our abilities and is there to support us if and when we make mistakes. It’s totally acceptable to make mistakes; if you aren’t you aren’t doing very much.

Empowered employees feel less pressure and are able to contribute much more as a result. Their productivity is enhanced and they become much stronger team players.

“If you aren’t making mistakes, then you aren’t trying to do very much.”

One of the keys to empowering your employees is to make a real effort in determining your game plan and in establishing clear responsibilities for everyone on the team. Every person must know what their responsibilities are and how they work to ward the success of the organization, and ultimately for the company.

People want the responsibility (albeit, possibly different levels and amounts of responsibility). Assign an appropriate level of responsibility for each of your employees that clearly works toward the good of the company and watch the results.

It all begins with you as the manager in developing a plan that supports the business and giving every member of the team an important responsibility that contributes toward the goal. There is significant effort on your part to do this well but when you do the results are powerful.

We've Landed!

IT Manager ToolKit

Sample #1 - New IT Employee Orientation Guide

New IT Employee Orientation
MDE_New IT Employee Orientation.doc

INSTRUCTIONS

Description: Prepare to start a newly hired employee off on the right foot by providing a comprehensive orientation. Your preparation tells your new employee a lot, and first impressions are big. This checklist will help you cover everything from A to Z and will get your new employee off to the right start.

Instructions:

Step 1 Review the list and make modifications as you feel are necessary for your situation.

Step 2 Finalize your list and make a copy to provide to the employee.

Step 3 In your initial meeting with the new employee, explain the contents of the checklist and make him/her aware that it will be up to the individual to complete all items and that you are there to assist in any means possible to assist in a productive orientation.

Step 4 Discuss your orientation items with the new employee and help him/her begin identifying with the new company.

New IT Employee Orientation

MDE_New IT Employee Orientation.doc

New IT Employee Orientation / Start-up List

A. Quick tour and introductions …………………………………… ____
B. Benefits Enrollment …………………………………………….. ____
C. The Company …………………………………………………… ____
- Company Mission ..………………………………………. ____
- The company's business ..………………………………… ____
- Company Organization ……………………...………….. ____
- Key departments relative to IT support ………..………… ____
- Strategic plans …..………………………………………… ____

D. Clients ………………………………………………………… ____
- IT products and services provided ………………………… ____
- Key clients ………………………………………………….. ____
- Client demographics ……………………………………….. ____
- The best and the worst, , ,and why ………………………… ____
- Key needs and challenges.………………………………….. ____
- Plans ………………………………………………………… ____

E. Company Departments …………………………………………… ____
- Key departments and their key people …………………….. ____
- Department needs …………………………………………….. ____
- Plans …………………………………………………………… ____

F. IT Organization …………………………………………………… ____
- Mission ……………………………………………………… ____
- Organization chart and major focus areas ………………….. ____
- Job description and responsibilities of the new hire ……….. ____
- Role within the IT organization …………………………….. ____
- Key focus areas of the new position ………………………… ____
- Keys to success ……………………………………………… ____
- Overview of other key IT staff and their responsibilities …… ____
- Challenges …………………………………………………… ____
- Opportunities ………………………………………………… ____

G. IT Vision and plan for the future ………………………………… ____
H. Key IT projects and status ……………………………………….. ____
I. IT Procedures/Processes that affect the new employee ………….. ____
J. Performance planning and performance review guidelines ……… ____
K. Career planning approach and guidelines ……………………….. ____
L. Education and training guidelines ..……………………………… ____
M. Miscellaneous ……………………………………………………… ____
- Phone list(s) ………………………………………………… ____
- After hours IT phone list …………………………………… ____
- Expense reporting …………………………………………… ____
- Timesheets (if required) …………………………………….. ____
- Security codes, cards, etc. ………………………………….. ____
- User-ID & passwords to systems …………………………… ____

N. Training plans for the new employee …………………………….. ____

Employee: ____________________ **Date:** _______ **Manager:** ____________________ **Date:** ________

Prior to your new employee starting, organize the items that help make him/her productive quickly including:

A. Equipment

Don't forget to prepare your new employee's desk and setup the equipment and software that he or she needs to perform the job. Having everything in place on the first day will set you apart from most managers. You would be surprised as to how many managers fail to take care of this until after the employee shows up. Nothing is less professional than having a new employee show up for work and there is no place for them to sit.

Important items to take care of include:

A. Identify cube/office location
B. Phone setup
C. PC/workstation setup
D. Printer configuration setup
E. USER-ID and password setup
F. Office supplies
G. Building, facility, and parking access cards and security codes
H. Business card order

B. Benefits

A major part of making a new employee feel a part of the company is to complete their benefits enrollment. Prior to their first day, you should have given the employee an employee benefits package that includes the material they need to understand their benefits and any options they might have.

Schedule a time with the appropriate person in your company to conduct the enrollment process with the new employee on their first day. Getting this behind you will help you begin focusing the new employee's efforts quickly.

Benefits and certain policy issues discussions should include the following at a minimum:

- Medical/dental insurance
- Life insurance
- Disability insurance
- 401k
- W4
- Vacation/holiday/sick day policy
- Employee Handbook
- Confidentiality agreement
- Non-solicitation agreement

IT Manager ToolKit

Sample #2 - Employee Training Plan

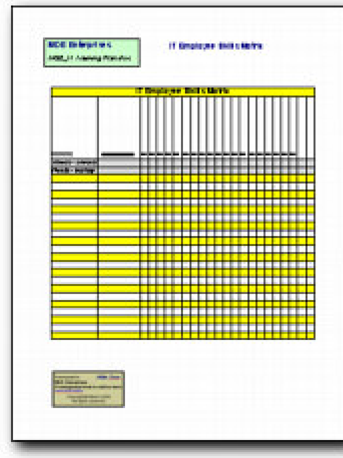
IT Training Plan

MDE_Employee Training Plan.doc

INSTRUCTIONS

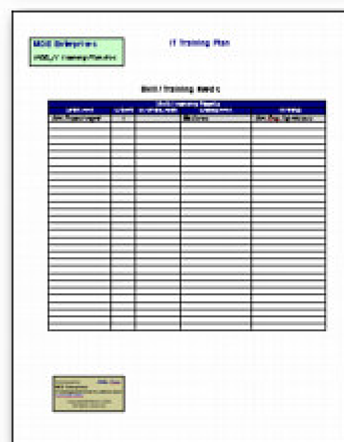
Description: Use these three templates to develop a specific training plan to improve the capabilities of your IT organization.

Instructions: Follow these simple steps to develop your own training plan.



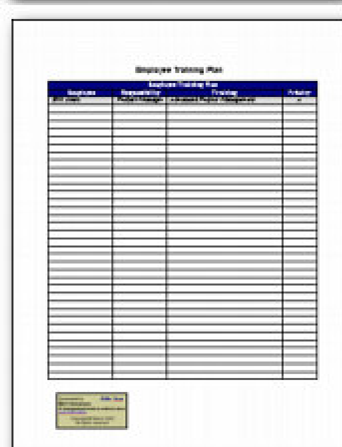
Step 1 Define what you need. Use the **IT Employee Skills Matrix** template to identify what you need in your organization. A copy is included in this tool for convenience. Refer to the tool instructions for more insight into using this tool.

Step 2 Define what you have. Using the **IT Employee Skills Matrix** template, determine what you have and do a gap analysis to quantify the skills your department lacks.



Step 3 Complete the template, **Skill/Training Needs**, and list all areas that you need to add certain skill expertise or that you need to add depth from the gap analysis in Step 2.

Skill Need	Specific skill needed
Expert	Need to create an expert
Backup/Depth	Need backup or depth
Employees	Employees identified to obtain the skill
Training	Training class or approach to take to gain the skill



Step 4 List all of your employees on the **Employee Training Plan** template and add the training needs identified in Step 3 for each employee. When finished, go back through your employee list and add training that is needed to improve the employee's skills that help your IT team the most.

Employee	Employee name
Responsibility	Employee's responsibility or title
Training	Training to be taken
Priority	Priority of the training initiative

When completed, you have developed an individualized training plan for each employee.

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MDE_IT Training Plan.doc

IT Employee Skills Matrix

Note: This tool and instructions are in file MDE_IT Employee SkillsMatrix.xls. You can also use the Word table format provided below.

IT Employee Skills Matrix

Employee	**Responsibility**	**Management**	**Leader/Supervisor**	**Client Service**	**Communication**	**Project Management**	**Industry Knowledge**	**Business Analysis**	**Application Design**	**Programming**	**Implementation**	**Training**	**Documentation**	**Help Desk**	**Network**	**Telecom**	**PC Desktop**	**Servers**	**Internet/Intranet**	**Computer Operations**		
Needs - primary																						
Needs - backup																						

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Skill / Training Needs

Skill/Training Needs				
Skill Need	Expert	Backup/Depth	Employee(s)	Training
Adv. Project mgmt	*1*		*Bill Jones*	*Adv. Proj. Mgmt class*

Employee Training Plan

Employee Training Plan			
Employee	**Responsibility**	**Training**	**Priority**
Bill Jones	*Project Manager*	*Advanced Project Management*	*A*

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