



SHARE SESSION REPORT

61	M376	Information Center - Plans & Controls	161
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PLANNING AN INFORMATION CENTER

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Information Center Project

Session Number M376

I. INTRODUCTION

The time is now for the Information Center concept. We have a solution to offer to the user.

As with all solutions, they must be planned for and administered with care, caution and yet expectation. Take care to plan in detail to insure success. Take caution against political battles to be waged. And maintain expectation for the useful benefits that can come from this function.

II. KNOW YOUR BUSINESS

Even if you already have an Information Center functioning, this will be useful. It may cause you to think. Treat the Information Center as a business not a technical function, WHY?

1. It will force new thinking by traditional data processing technical people.
2. Your end users will be non-technical people for the most part (non-technical D. P. that is ).
3. Your competition ( and it will come, if not already there) is another business and you must be able to meet them on their ground.

To force this thinking, there exists a minimum of 11 questions you should ask yourself, preferably before you start an Information Center. Whether you run your Information Center as a profit center, cost center or staff overhead does not matter. Whether you charge back for the user of this service or not, these questions will help you codify your thinking and formulate a strategy to help insure success of your function and productivity and profitability for your company.

1. What business am I in?  
Be sure you and your management agree on your charter of activities and the scope of your efforts. This will define your business. Lack of definition can create many problems. The business can be defined with limits that can later be expanded as your experience proves the ability to handle.
2. What services do I provide?  
The services can be many. Time-sharing, batch processing, consultation, systems analysis/design, programming, training, end-user tools, and more. List them and know why or why not to offer, even if the answer is -that's all we have to offer.
3. Where is my market?  
Is it local, regional, national or international?
4. Who will buy?  
Even if you don't charge back for services, determine if you serve one function, division staff group or the entire corporation. What about subsidiaries? What about customers external to the company? Are the customers in production, finance, marketing or maybe even in data processing?

461

5. Who is my competition?

It will exist in one form or another. Time-sharing vendors, mini computer vendors and personal computer vendors will at one time or other be seeking to do business with your customers, if not already. Know what they offer and how you plan to counter the offer. If you can't beat them, you may just want to join them and internally market their service. Don't try to provide a service to counter the competition if you don't really have one.

6. What merchandising methods will I use?

Advertising and personal selling both can be used, User presentation, products seminars, newsletters, and user meetings are all types that can be effective in letting your customers know what it is that you can do for them and or the company. The size and location of your market will tell what strategy to use. If the market is other than local, travel can get expensive.

7. What is my sales strategy?

You should have one even if you don't feel you have to sell e.g. company policy will dictate they use my service. Your life can be much easier and job expectancy much longer if you sell your service rather than clubbing people with company policy.

Know your customer set.

Subset the market to high, medium and low priority customers.

Choose a likely successful and eager first customer.

8. What management controls are needed?

Whether a new service or an in-process function, your Information Center needs management controls if it is to function properly and provide a consistent service. Choose a set of Critical Success Factors (CSF'S) that will tell you when something is not functioning within prescribed standards or limits. Measure and track them to know for sure what is happening.

9. How can they be carried out?

Use assignments through work plans, project plans or whatever device is available. Be sure to put mechanisms in place to assure continuous monitoring whether manual or automated.

10. What resources are required?

People, hardware, software, facilities layout, communications and the money to pay for it all. Plan with reasonable expectations. Understaffing and underbudgeting will cause significant problems in providing a consistent and reliable service. If resources are tight, scale down the service in terms of products and services to offer and customers to begin servicing.

11. When should I revise my plan?

Annually or more often? Much will depend on your experience with planning. Too often will create potential confusion by perhaps shifting priorities and strategies before they conclusively prove

success or failure. Too seldom can lead to an inability to respond to changing requirements and customers.

These questions should be asked before beginning to establish an Information Center. However, if you are like many here who have a functioning Information Center, ask them now. You may surprise yourself by the ability or inability to readily answer some of them.

III. Administration of the RCS

Let's move now to basics of Administration of the IC. In covering the basics of administration, it is soon apparent we are dealing with basic management functions. Planning, organizing, operation, controlling and reviewing are all critical issues. Let's see how they apply here and how to deal with each function.

Planning

To begin a plan, decide what format the finished product should look like. That may seem unnecessary, like planning for the plan. But if you don't know what you want in your plan, how will you know when it's finished?

Strategies and objectives need to be written down. The first time through they are likely to be incomplete and maybe in too much detail, but write them anyway. Putting ideas on paper creates an atmosphere of commitment. Here are some:

- o Overall strategies that give long range direction on the services itself and the products offered.
- o Objectives to be met in the short term and long term from different years.

Planning like this will add stability to the function and give both the customers and support staff knowledge of where the IC is going. This will help to eliminate much of the fire-fighting mode of management. Plans are not to be created and then shelved and followed without review for changing circumstances. Plans are made to be changed, but at least you'll know from what and to what and why. It will also give you something to measure against to know how you are doing.

Planning does not always insure success nor does lack of planning guarantee failure. But, there is substantial proof that the more carefully you plan, the more successfully you will execute. You will also be able to make better use of the resources assigned.

The implementation of the plan is next. This gets into more details and schedules. This plan is written to be business oriented rather than technical.

A staffing plan is useful to show management what you think you will need over the next one, two, three years. This is not intended to be accurate resources estimating and is certainly no guarantee of obtaining needed people resources. However, it will give upper management some feel of the commitment required to make this service work efficiently and effectively. On an annual basis the staffing plan is to be followed with a training plan by individual based on an assessment of their current skills against required level of skills.

The next section of the plan is Hardware and Software Requirements. Capacity planning should be based on meeting some performance specifications and general trend analysis. Otherwise it becomes a difficult exercise at best. The trend analysis helps to predict when you will be unable to meet your performance standards. Since you will likely be offering a service that competes with time-sharing and mini or personal computing vendor, be prepared to set and meet standards that your customers can rely on. Otherwise, the request to use alternate services will be forthcoming.

Identify, with the capacity planning function, hardware associated indicators that can be tracked and forecasted with some degree of accuracy. The capacity planning function can provide statistics on current and forecasted use. The IC will adjust the forecast based on known efforts to advertise or market some new users or plan to offer some new products. This adjusted forecast can be given back to capacity planning for estimation of the point at which degradation of the performance level will occur and take appropriate action.

This area is significant since the customer's overall impression of a service is often geared to a single item such as interactive response time or number of busy signals when dialing. If performance standards are not used, it will be difficult if not impossible to offer quality service with consistency. Unless, of course, your company gives you more money than you need to acquire all the hardware you guess than you might need.

Software requirements are indicated in a matrix fashion, this matrix is intended to show the products currently offered or planned to be offered or dropped. The planned changes are supported by the objectives for the associated years.

The Financial plan is basically the current year budget and estimated future cost with the associated planned charges for the services.

This constitutes the makeup of the long range plan for the IC. There will no doubt be many changes in the content as well as the format. But, it does exist and anyone that would have to assume the responsibility for the function could quickly determine it's direction and rate of progress. Also, the customers can have more assurance of your intent to meet their needs now and in the future. It does mean that your customers and boss will be expecting you to perform to the plan and that can put pressure rather than the constant crisis alternative. A reminder, ever though it any be a 5 year plan, don't wait 5 years to review it and replan.

ORGANIZING

After the plan is produced, a review of the organization should be undertaken to insure the ability to meet the plan.

OPERATING

There are many items to be covered in the routine operating of the IC.

Promotion of products and services is carried out in four ways:

1. Newsletters - National and Regional
2. User Meetings -with coffee and donuts
3. Products Announcements
4. New User Presentation

To draw attention to the correspondence, develop a logo to identify the IC. This will be used on all literature and user manuals/guides issued. Take advantage of any way to get your customers to identify with your services. Build a reputation for "doing it right" or "with a little class" Remember your competition and how they are perceived.

Standards and Procedures cannot be overlooked. Although mostly thought of as a nuisance they, like planning, will help to to eliminate crisis management. Standards and procedures cannot realistically be developed to cover every possible thing that can happen. However, they do help to insure that situations are handled consistently, accurately and fairly. They also provide a means of getting decisions of daily matters to the lowest practical level for handling. Most often, for every function that requires a procedure for customers, there will be a corresponding internal procedure.

Request for User ID	Handling User ID Requests
Requesting Training	Handling Training Requests

A complete user manual is published with instruction from using the system to requesting credits on charges. This manual is maintained by the IC and given to each new user when they attend their first class offered by the IC.

To charge or not to charge? That is a difficult question. It should be addressed carefully since either strategy can work but can also have pitfalls. This approach puts the decision-making responsibility of the amount of use directly on the customer who will gain the benefit from the use. Arguments can be made between opposing viewpoints with no reconciliation possible, but most people react with caution when services or products are not free. Examples throughout business and society itself will support this idea when something is free, it tends to be abused and wasted.

You build your case within your company as to whichever way you want to go. At least, you should know the cost of your Information Center whether you charge or not. It is very likely that since it does cost the company money, management will want you to justify that expense.

Limit the number of items making up the cost. This means that some times will be charged for at a higher rate than actual cost in order to recover all costs. Charges include:

- CPU seconds
- Memory requested
- Disk and Tape I/O's
- Print lines
- TSO connect time
- Disk storage

There is a provision for discounts on processing. These discounts are based upon turnaround time needed. The faster the turnaround request, the higher the price.

The interface to other data processing functions is mixed. To Operations you are a customer. In reality you are more of a retailer of their system, but in their view point, a customer. The need exists to have a service agreement with Operations which set reliability/availability standard for them to meet. They in turn look to capacity planning to provide them the capability to meet those standards.

The Business Systems Development group can be a customer if it is set up that way they can receive training and support through the IC.

System Software represents a resource to the IC in installing and maintaining end-user products, security precautions and other operating system requirements to support our functions. Compete for their time on project plans as does any other data processing function. When the dedicated system is approved, it will include provision for decated software support.

A growing relationship is occurring with the Data Base Administrator. That function as the desire to make the captured data more readily available to the corporation with necessary security precautions. The IC has the same basic goal. The only difference is to provide additional analysis and manipulation tools that are integrated through a single dictionary. Provide data handling through a DBMS function that the IC customers can actually use.

The IC physical facilities requirements are as any other function. Offices, are needed for support personnel who provide program debugging assistance, consultation or whatever customer support is needed.

The concept of a single help desk is important. The strategy applied to user support significantly impacts the physical facilities needed. Also, the strategy of customer specialists vs product specialist vs general support will created differnt demands from help desk facilities. Be customer specialist oriented with a support strategy of developing customer skills to make them more independent.

Training is another topic to be covered and is part of the regular operation of the IC. Define levels of support from 1 to 4. Each product is then designated a specific level. Products at level 1 receive training as will as support by the IC. Begin to use various media for these courses as determined by the course material. When contention for space in classes becomes a problem, a priority system is invoked. Replacement personnel training is first followed by new customers and last comes career development training. A mailing list of all persons who have been trained is maintained and is also used for distribution of user manual update, newsletters, etc. Training requires resourses like everything else and must be administered with strategies and objectives as all other IC functions.

CONTROLLING

Most systems or functions, left to themselves, will tend to deteriorate unless methodologies are put in place to cotrol the level of performance and work accomplished. Controlling is needed both for use of the system by the customers and performance of the IC function.

What about controlling the customer in use of the IC. Security is normally related to prevention of access to data not authorized to an individual for whatever reasons. It can also cover the category of prevention of misuse of the system.

Controls for security include many methods:

- User IDs and passwords
- Command level execution permission (PCF)
- Copies of files rather than originals
- Subsets of files
- Software-based on a user ID structure

Use all of these methods at one time or another depending on the need.

Charging for use or an allocation system are other methods to help control the amount of the system used by the IC. economic decisions are better than an allocation-based approach, but you must decide for your location.

Controls also take the form of standards to be met in performance . In other words, controlling the quality of the service.

Performance or Service Levels have multiple values, they indicate to the customer your intent to service the needs, to capacity planning our basis for additional facilities, and to yourself a standard to measure against to know where you are. It dosen't matter whether tracking is done manually or with 4 color graphics. Start simple and grow.

Here are some examples of system performance levels to be tracked:

1. Monthly Job Class Turnaround- originally defined as time from input to start of execution - actually tracked as time from input until off of the output device.  
To highlight quickly what is happening use multicolored highlighters to mark the results. Yellow is OK and pink is a missed performance level. These hang on any wall and can quickly support or refute claims by customers or others as to actual performance.
2. Weekly Job Class and TSO Response- contains a weekly review of job class turnaround and response time on TSO.
3. Dial Up Availability- to track the amount of time that all lines were busy and the number of calls that were turned away. The standard is based on the permissible number of minutes per hour of all lines busy.

(page 8)

What you should do depends on what services levels you want to establish and what standards you want to be measured against. The danger in establishing standards is that someone will expect you to meet them.

Besides the quality of performance of the system, there is the all important quality of performance of the people. Work plans, project plans and performance standards are also used for the personnel in the IC. Without people performance, system performance is not possible.

#### REVIEWING

With all the planning, organizing and controlling facilities in place, failure is certain unless we review the efforts, assess the need for change, and plan the changes. Reviewing is the final link in the circular chain of administration of any function and applies equally well to an Information Center.

The administrator or manager needs to know answers to two basic questions. Are we doing the right things? Are we doing them in the right way? The review process is necessary to determine that.

If the answer is yes to both, then keep on computing. If not, some changes are in order.

How do you know if you are doing the right things? That goes back to your charter-- what were you created to accomplish? Conversion of time-sharing, improve end-user productivity, reduce the backlog of systems development are a few of the reasons that Information Centers are started. Your measure of effectiveness is how well you are meeting those requirements. The efficiency is accomplishing those tasks in the right manner.

It is easier to measure the efficiency. Critical Success Factors (CSF 's) can be set up to tell you when you are performing best. Those can include system performance level, personnel standards for performance, budget variance analysis, etc. Internal meetings can be held to review projects and CSF. User meetings can be held to get some outside input. Survey's can be taken and training course can be evaluated. Do most of these on a regular basis. As a measure of efficiency, you need to be able to say you deliver your products and services on time within your budget and to the specifications agreed to with the customer.

Measuring effectiveness is another matter. Are you doing the right things? You may even question your charter ( if you have one). (Your ability to measure effectiveness equals your ability to justify your existence.). Ignoring this problem will not make it go away. Rather, as your organization grows and becomes more noticeable in its use of the system, your need to justify the function will grow along with it.

If this is not done on a financial basis at the beginning of the service, it is harder to do later, with little collected data, but more important than ever. Briefly state what the problem was and what the computer solution

(page 9)

aid. It then attempts to quantify the annual saving, labor dollar, reduced inventory cost, etc., and subtracting the computer charges, arrive at a net figure of dollars of improved productivity or cost reduction. These will be tabulated and periodic results reported to management

This approach will work when IC personnel assists in the development effort. It is not certain how well the users will do in completing this form for efforts undertaken by themselves. Repeated urging of the need for this data hopefully will draw it out. There must only be a "representative" sample to give management the basic picture and let them extrapolate to the rest.

#### VI. Wrap-up

1. Planning is important- don't minimize the effort.
2. Remember that plans do change and after the review process, be ready to change. Be sure adequate controls are in place, not only for security, but also to insure a consistent quality of service.
3. Then, of course, set up review cycles for all facets of the function.

A recent Fortune article gave some interesting information to consider. Innovation accounts for 45% of all productivity improvement in recent decades. One third of that is directly traceable to the computer. This trend is growing. Other sources say that of the tools available to business to leverage productivity, the computer generates the highest leverageing component.

Data Processing has solutions for many of the companies needs. The Information Center is a vehicle that can put this power of solutions and productivity improvement directly into the hands of the end user. Treat the Information Center as a business and go sell the solutions.

