Mike Sisco's

IT Manager Articles Collection

Over 100 articles in all

Practical IT Manager Tips

"War Stories"

Letters from the Field

IT Management Models

Technical Tips

Entrepreneur Tips

Quick reading to achieve more !

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Mike Sisco's
IT Manager Articles Collection

Introduction

Welcome to the first publication of a collection of my IT Manager articles. The articles included in this publication have all been published in my **Practical Technology Tips Newsletter** between April, 2001 and December 2003.

There are more than 100 articles in all that were provided to my newsletter subscribers for free. In fact, you can still access them from the newsletter archive site at http://www.mde.net/ezine .

For your convenience, I have grouped all the articles into categories. The categories include:

- Practical IT Manager Tips
- "War Stories"
- Letters From the Field
- IT Management Models
- Technical Tips
- Entrepreneur Tips
- Products and Services Review

I hope you enjoy the material.

For more IT Manager products and services, take a look at www.mde.net .

Best of success in all your efforts.

Mike Sisco

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I. Practical IT Manager Tips

Practical IT Manager Tips focuses on tips and techniques that can make a difference in productivity, results, or incidental things that can help an IT Manager be more effective.

MDE's mission is to provide practical resources and training that helps IT Managers achieve more success. These free articles are predominately from experiences that have helped me achieve greater results in the past and they will help you as well.

Understand Your Company Objectives

Let’s assume that you have just been promoted to a new IT manager position within your company, or you have just joined a new company as an IT Manager, or even the CIO position. The first thing you want to do is to meet with the IT staff – right ? WRONG !!

The first thing I want to do is to be absolutely sure that I understand what the company is trying to achieve as a business. There will be plenty of time to spend with your new staff. But before you start spending a lot of time in IT, spend the time it takes to understand the bigger picture of what the company is trying to achieve and find out how the IT organization fits into those goals from the senior management team’s perspective. Typical questions to ask are:

- What are the company growth plans ?
- What are critical parts that IT must play to help the company achieve it’s goals ?
- How does the company plan to grow – acquisition, more sales, new product lines ?
- How well is the IT organization (or your department) doing in terms of what is needed ?
- What are the key challenges of the company relative to technology ?
- What would you have IT do that they aren’t currently doing for you ?

There are many more, but hopefully you’re getting the idea. Start out by getting the ‘big picture’ before you dive into the detail. I can’t tell you how many times I’ve worked with a company that has very bright technical people working very hard – but they are missing the point in terms of what the company really needs from them. So, understand the business owner needs (senior management) first.

Once you have a pretty good idea of what the company wants to achieve and how they plan to do it, ask these managers how the IT group is handling their role today. Give these managers plenty of opportunity to tell you what’s good about the organization as well as what might be missing or deficient. The better you understand this the better you’re going to be able to address some of the challenges that will be faced later.

Assess the IT Organization's delivery of services – Client Assessments

It's worth making a point here. I love picking up an organization and fine tuning it so that it becomes successful and delivers great things for its customers (whether that be an external client or an internal department of the company). A typical scenario that I've seen is that the IT organization views itself as hard working, doing the right things, understaffed, and not appreciated very well. Sound familiar ? On the other hand, the client and senior management team more than not sees the IT staff as working on projects that don't really benefit them, rarely delivers what they say they will and when they say they can, does not communicate with users very well, and is not very responsive.

Wow !!

How can there be such a difference of opinion you ask? Well, there are many issues that contribute to the disparity but the point is that this is the picture you get most of the time if you go into a company and do an objective evaluation and there is a big difference of opinion.

What does it mean ?

It means that there is a major opportunity for success in most situations by following a few guidelines that I'll share with you over the next several issues. Putting these key attributes into your management repertoire will help you achieve success as an IT manager.

So, before you race off to talk to the IT staff on how the IT department is performing, you better learn what the customer thinks first. You want an objective evaluation and you're much more likely to perform objectively if you begin at the higher level and work your way down. Always remember that the client's perspective is a valid one and needs to be understood.

If the client (again it could be an external customer or an internal department that the IT department supports) paints a poor picture of the IT organization's performance, it's typically because of one of three reasons.:

1. IT has not developed a relationship with the client that allows (and requires) the client to participate in setting priorities and is part of the quality assurance process in delivering services. No real partnership exists.
2. IT is not managing the client's expectations in terms of appropriate delivery of services based upon the IT organization's capabilities.
3. The IT organization actually does a poor job.

In every case, the responsibility falls on the IT staff, not the client. Yes, there are a few clients that no matter what you do, you just can't satisfy their expectations. But, after 20 years of dealing with all types of clients (probably in the thousands) I have only met one or two that fall into that category. So, my point is that if the client feels like IT is doing a poor job, the reason usually falls back to the IT organization.

The good news ? What this means that once addressed properly, IT can change the situation to a positive one and can control its own destiny.

One last time. Understand what senior management's perspective is first, then the client, and finally the IT staff's. We'll cover this part in the next issue in the <u>Assess the IT Organization's Capabilities</u>.

Assessing the IT Organization's Capabilities

Once you know what senior management and the client thinks about IT, it's time to develop your appraisal of the IT organization's capabilities. In my approach, I break this into the following areas:

1. Infrastructure
2. Business applications
3. Staffing organization
4. Processes

The objective of going through the three assessments (company or senior management, the client, and finally the IT organization) is to be able to formulate your immediate action plan. Every situation has different issues so the right plan for any given situation is inevitably unique to that situation. By understanding each of the issues above, you will have the information required to develop the appropriate plan.

Let me say this a different way. I go through the assessments to allow me to size up the situation and to develop three things:

1. My 90-day plan
2. My resource needs "short" list (infrastructure, business apps needs, staff, processes)
3. The beginnings of my 12-18 month plan

Let's take a quick look at each of the four areas that I assess within IT:

A. Infrastructure - Take a walk through the organization with your key infrastructure resources (systems, desktop devices, and networking equipment and services). You're looking for a few key issues that are key to having an infrastructure that is stable and scaleable:

   1. Organization of the equipment and networks
   2. Stability of the environment - especially server, high speed printer, and network areas
   3. Server and network security
   4. Server backup
   5. Accessibility of users to server and network areas
   6. Recovery plans
   7. Standardization of systems across the enterprise
   8. Support desk approach to supporting infrastructure components
   9. Change management process
   10. Staff that supports infrastructure

A. Business applications - Sit down with the key IT people that develop and support the business applications of the company. In doing this there are several things to understand:

   1. What are the business applications and how many users are there ?
   2. Who supports the business application - vendor or IT staff?
   3. Level of support needed for the application
   4. Change management process in place
   5. Support desk process in place
   6. Weaknesses or key functionality gaps in each application
   7. Level of automation - i.e., key opportunities that additional automation provides
   8. Staff that supports business applications
   9. Critical business operation components

B. Staffing organization - Assess the dynamics associated with the current IT staff including the following:

1. Staff level that exists relative to the need you have assessed in earlier interviews.
2. Staff expertise - are there major gaps or key areas that lack proper depth ?
3. Staff experience
4. Staff professionalism and understanding of "client service"
5. The organization's understanding of a change management process
6. The organization's approach to project management
7. Identify the leaders
8. Assess compensation rates, past performance planning and review process
9. Understanding of each IT member's perspective of:
10. The IT organization's mission
11. The individual's role in the organization
12. Client service
13. How the IT organization is performing
14. Challenges
15. Company
16. Client
17. IT organization

C. Processes - Appropriate business processes make the difference in an IT organization's effectiveness. Here, you want to understand the processes that exist and determine to what extent the people in IT understand the need for them. They include:

1. Software change management
2. Infrastructure change management
3. Employee add, change, delete process
4. Infrastructure help desk
5. Business applications help desk
6. Capital equipment purchasing approvals and ordering
7. Capital equipment and software license "inventorying" process
8. Escalation procedures
9. Disaster recovery

Infrastructure Strategy

This month's topic of my "11 key attributes of any successful IT manager" is titled **Infrastructure Strategy**. Many of you might ask, "How does systems infrastructure have anything to do with my IT management role ?" If your role is to manage an IT Support Desk, or if you are a Programming Manager, I can see how you might ask this question.

If you manage any portion of an IT organization, it's important that you have an understanding of your technology infrastructure. I would be the first to tell you that my understanding of systems infrastructure is at an issue level, a priority focus, and a concept of what is needed to provide a stable, yet scaleable systems environment for the business units of a company that need technology to do their jobs.

Yes, that's right, a CIO, which I've been most of my career, does not have to be an expert systems specialist to manage IT, but he or she should have a good fundamental understanding of the components that make up a company's technology infrastructure and how they fit into a service strategy.

The best example I can think of is that, "I don't have to know how to set up e-mail on Microsoft Outlook to effectively manage the technology resources charged with managing e-mail for the company." I do need to have insight into the company's current and future need of e-mail and issues that might surround the implementation of e-mail (cost, security, naming schemes, other related services, etc).

The parts that are included in my definition of systems infrastructure include:

- application servers
- local area networks (LAN's)
- wide area networks (WAN's)
- data center or computer center
- systems security
- e-mail
- internet servers and connectivity
- intranet servers and connectivity
- distributed office connectivity
- desktop standards
- printing standards
- infrastructure help desk
- infrastructure monitoring & support tools
- remote "dial-in" standards

At a CIO level, you need to have a pretty good understanding of each of these areas and insure that you have "experts" in place capable of supporting and migrating your infrastructure as needed to support changes in your business environment.

At an IT manager level, you should have an understanding of the infrastructure components that are required to carry out your responsibilities and that will support your success. For example, a Programming Manager is dependent upon sufficient application server, security, and appropriate accessibility of users that use the business applications that your organization might support. If your company plans to grow significantly, it makes sense that the programming manager should understand the infrastructure requirements that will be required to support his application for a much larger user base. Don't go "put your head in the sand". It pays dividends for you to help anticipate the needs of the future with the other managers charged with infrastructure responsibility. After all, you're part of a team and watching out for one another is a big part of teamwork.

Developing an infrastructure strategy should follow a certain priority. Establishing a stable and supportable environment would be my first priority. Adding new systems, additional networks, etc. in an already unstable environment simply adds to the challenge. Stabilize what you have first.

Next, fill basic service gaps that provide the company with critical services that allow your IT organization to be a responsive support organization. E-mail services, support desk capabilities, change management processes, and escalation procedures fall into this category.

Finally, identify and address infrastructure issues that anticipate your future need. Position your systems, networks, organizations, etc. for future growth or expected strategic initiatives. That doesn't mean "run out and buy before you need the new technology". It does mean you should develop a strategy and a logical game plan by which you identify the infrastructure components that will be needed assuming certain things happen in the company and how you would go about adding each component.

Every project that you initiate should take into consideration means that provide five things for your company's infrastructure:

1. stability
2. supportability
3. scalability
4. security
5. cost effectiveness

If you can balance these needs of your company when you develop your infrastructure strategy, you will be providing excellent value, , , and that increases your value to your company.

For more on developing an infrastructure strategy for your company, take a look at my IT Management Development Series of publications. The titles of all 10 publications and their Table of Contents can be viewed at www.mde.net/cio .

Business Applications Strategy

This month's topic of my "Eleven key attributes of any successful IT manager" is titled **Business Applications Strategy**.

Your company's business applications are the "meat and potatoes" of the business. This is the area that typically provides the greatest opportunity for leverage in the company. That leverage might be the opportunity to increase revenues or it might be the opportunity to reduce expenses significantly. It might also offer your company a chance to differentiate itself from competitors.

As you assess your company's business applications, you want to develop a strategy that accomplishes the following:

- fills functionality gaps necessary to run the business
- adds functionality that enhances revenue potential
- adds functionality that decreases expenses by improving staff productivity
- adds functionality that competes stronger or that differentiates the company
- addresses architecture issues that allow for growth

Filling immediate functionality gaps is an important "to-do" before you work on significant enhancements. If you don't already have stable business applications with core functionality issues addressed, you may need to conduct a buy versus build analysis to determine the best approach for your company to proceed.

Once the basic functionality issues are in place, line up the priorities that either help increase revenue, decrease expense, or differentiate the company. This will be different for each company. When you determine the major initiative to take in improving your business applications, you want to go after the items that provide the greatest return for the company. The best return on an investment may not be financial improvement; it may very well be something that allows the company to compete better or that separates it from the competition.

If your company is planning to grow, take a close look at the architecture of the applications to ensure all critical business applications will support the growth.

For more on developing a business applications strategy, take a look at the **IT Manager Development Series**. The titles of all 10 publications and their Table of Contents can be viewed at www.mde.net/cio .

Strategic Projects Strategy

This month's topic of my "Eleven key attributes of any successful IT manager" is **Develop a Strategic Plan**. When a new CIO takes the reins of an existing IT organization of a company, he will normally find many opportunities. Before he can go to work on strategic projects, tactical issues that help stabilize the technical environment usually have to be addressed first. We spent the first five newsletter topics of this section on strategies that lead up to strategic planning.

As you look at a company in trying to define a strategic plan, you have to understand the industry business drivers, senior management goals and needs, and insight into the benefits that different technologies offer the company.

If you don't have the experience in your company's industry, you have to find it. It will be hard to develop a strategy if you don't know where the "pressure points" are to help your company. You can seek this insight from other senior managers or your counterparts in the industry.

Determining your senior management team's objectives is crucial as we discussed in the April Newsletter. Developing a plan that meets the company's needs is first and foremost. You are pretty much guaranteed missing the target if you don't know what management wants to achieve.

Gaining insight into technologies and their potential benefits comes from experience and in keeping an open ear to opportunities. Listening to vendors talk about their technology and making the connection to your business is a valuable skill to have. Looking for the positives while understanding the risks is a recommended approach to reviewing any new technology. Keep yourself grounded and look for the practicality of a technology as well as the "shining glimmer" described by the vendor.

One approach to developing a strategic plan that I've used many times is to establish the six or so major emphasis areas (strategic initiatives) that will help the company achieve its long term goals. Then, list each individual project in the initiative groups required to complete the initiative. Prioritize the individual projects and develop a strategic plan chart using VISIO, M/S POWERPOINT or similar tool.

An example of a strategic plan is located at web site www.mde.net/strategy . You can take this example a bit further by plotting 3-month or 6-month timelines that will help everyone see and relate to the overall strategy. By plotting the projects on a chart you can see timelines and relate to the prerequisites of other projects easily.

When they say, "All roads lead to Rome, , ," it's true. There are going to be any number of approaches to a strategic plan that will generate the result you want. The important thing is to develop a plan and put a "stake in the ground" that establishes where you are headed. By so doing, you will either get wholehearted concurrence or input from others that helps you adjust the plan as needed. Either way, you win. Most don't develop a strategy and communicate it to others. When you do, it separates you from the norm and generates additional credibility. It also helps you establish where you are going and you should not be surprised to open your eyes one day and find yourself at the destination.

For more on developing a strategic project strategy, take a look at the IT Manager Development Series publication titled **Building a Strategic IT Plan**. Table of Contents and excerpts can be viewed at www.mde.net/cio .

Creating a Vision

This seventh topic of my “Eleven key attributes of any successful IT manager” is **Creating a Vision**. Now that you have completed the assessments, put into place the initial tactical plans, and last month defined the strategic projects, it is time to create your management vision. See past articles for discussions on all of these items at www.mde.net/ezine .

Creating a management vision does several things:

1. It forces you to think through your strategy when you put it to paper.
2. It creates a document that helps you clarify the dependencies and prerequisites of projects.
3. It creates a picture for your team to help you focus their efforts.
4. It creates a picture for your senior management team to position their support.
5. It creates a picture for your clients to help you manage their expectations.
6. It will help you quantify and to gain endorsement on the strategic plan.

Communicating where you are headed is essential to arrive at your destination successfully. “Wow, that’s pretty basic.”, you may be saying to yourself. Yes, you’re right but you might be surprised at the number of people, including managers, that go along simply doing the work and not realizing the need to communicate what’s taking place. For your IT staff, for management, and for your client it is truly an essential ingredient for successful arrival and not just getting to a destination.

Nothing tells the story better than a picture. It’s true, a picture is worth a thousand words. After you complete your strategic plan, you really do need to develop a picture that helps others see and relate to your vision. You will also find that when you have the opportunity to discuss your plan, the picture will eliminate many questions and will help you explain others that come up.

OK, already. We agree to go to art school and , , , . Whoa, not so fast! (Is that how you spell “whoa” ? My Tennessee background always comes out when I write.) Art is not necessary. What is required is an understanding of how to organize a set of projects and initiatives into a logical presentation. It will also help to use VISIO, PowerPoint, or some other graphics presentation software to develop a professional looking presentation.

Here is a quick idea of how to proceed:

1. List all your major projects or initiatives.
2. Categorize them into logical initiative groups, preferably six or less.
3. Place each project into a priority sequence.
4. Determine projects that are prerequisites to each project or initiative.
5. Take one group at a time and put together a high level timeline. This timeline has no dates, just a graphic representation showing an individual project taking up time in relationship to other projects and that shows the prerequisite relationship of other projects.
6. Put the groups together into a master visual plan (the vision).

Initially, you may want to put this together with just pencil and paper. Once you have it looking like you want, you can them put the entire strategic plan onto your graphical software such as VISIO very quickly. I typically color code and number projects within a major project initiative group to help refer discussions to specific blocks on the picture. Anything you do to help your audience grasp what it is, relate to the challenges and dependencies, etc. will help your communication objectives.

As you do more and more plans, it will become much easier to develop them right on your computer rather than creating a draft on paper first. With tools that are available, it’s a simple task to move project blocks, etc. around as needed. Either way, take the steps that are most comfortable for you.

A sample strategic plan that I developed in the past is located at www.mde.net/strategy . In this example, you can easily see the major initiative groups, key projects, dependencies, and rough timelines. You will also note that in the example we don't provide exact timelines, only relationships of the initiatives and projects to one another. By presenting it this way, it is fairly easy to see the implications of changing projects or moving them around.

For more insight into developing a strategic plan and creating a vision, take a look at the publication titled **Building a Strategic IT Plan** in the **IT Manager Development Series**. Table of Contents and additional information is available at www.mde.net/cio/page4.html .

Staffing, Organization, and Focus

One of the keys to a successful management role is having enough staff, right ?

Wrong !

The key is having the right level of staff (quantity and quality) for the specific mission or set of challenges that you have as a manager. That's the first part. The second part is organizing the staff so they know their responsibilities and are empowered to take care of their areas of responsibility. The third part of this discussion is "focus". You can have the strongest team in the world, but unless the team is organized and focused on the appropriate business issues, so what !

Staffing is key. Your success as a manager is always based upon what your staff can accomplish, not what you can do. That was a hard lesson for me to learn early on as a manager but as time passed it has paid off over and over. Focus your staffing on people that have strong work ethic, attention to detail, and want to do a good job and you will be much happier.

I've always said that I would rather have half a dozen highly capable people that cost more individually than a dozen or more average performers. The total cost will be less and the results will be significantly more. I have always tried to surround myself with very capable people; it is the key to developing a highly successful organization.

I always look for aptitude rather than simply pure technical skills. You need both but the dynamic team has players that can adapt to change faster and will learn to solve the toughest problems. Seed your team with the technical guru that you need but have plenty of quality people that can adapt and can think "out of the box" when called upon to do so.

Organize the responsibilities so that you have critical skills covered with bench strength in those areas that could become a risk if you lose one person. Lay out the organization plan so everyone can see the areas of responsibility of each member of the team and reinforce how important each staff member is to the success of the team.

When you clarify each person's responsible areas with the individual as well as the rest of the staff, you create a stronger "self governing" environment. Defining responsibilities for everyone and reinforcing how the team needs to work as both individuals and as supporting team members is essential. One of my sayings is that, "We will be successful as a team, not as individuals. If the team is successful, we are all successful. If the team fails, we all fail."

Staffing your organization sufficiently to accomplish contradicting goals is a tough one. Successful project completion, employee goals, budget constraints, company changes, client challenges, and other issues tend to collide with one another as you manage resources to provide products and services of value. Understand the primary drivers of your company, staff with excellent people, and organize them in a manner that supports the business objectives of the company and you will succeed.

Focus your staff by providing team charters and individual performance plans. If you manage a Help Desk team of 12 people, you need to focus everyone on the mission of the Help Desk. Write it down and refer to your Team Charter often to reinforce the focus that you want.

In addition, develop individual performance plans with the team charter in mind. Every individual's performance plan should be geared to performance that supports the team objectives and the company's overall business goals.

Performance plan delivery and review sessions are powerful tools that provide the manager with quality time with each employee in targeting his/her efforts on where you think they need to be. Don't miss out on this valuable opportunity. Plans that are developed well and delivered with sincerity are powerful motivators for your staff.

Building a successful staff is similar to almost any type of project. To accomplish it successfully, you need to:

- Define the goals
- Quantify and prioritize the skills needed
- Develop team charters
- Hire the staff (You may also need to eliminate staff)
- Develop individual performance plans
- Deliver the team charter and performance plans
- Reinforce responsibilities and success factors constantly

I know that this is very simplistic. In reality, developing a motivated staff capable of great things is simpler than what most managers believe it to be if you follow a few proven steps.

For more insight into developing a successful IT organization, take a look at the publication titled **Building a Successful IT Organization** in the **IT Manager Development Series**. Table of Contents and additional information is available at www.mde.net/cio/page5.html .

IT Project Management

Instilling sound project management skills in your IT organization will help you sleep better at night. Nothing is more comforting to know that your projects are "tracking" and on target for completion on time and within budget.

Unfortunately, most IT projects are not completed on time and within budget. In fact, by all estimates that I've seen, it is estimated that more than 70% of all major IT projects in companies are either cancelled, miss target dates, or exceed their budget. The primary reason is that there is not enough focus and attention paid to incorporating sound project management skills within companies.

Project management skills are becoming more and more important in companies throughout the world as companies see the benefits of accomplishing their projects on time and within budget. One key benefit is obviously cost savings associated with completing a large project.

Project management does not have to be complex. There are excellent resources available in classroom training, home study materials, and even free materials can be found on the internet. There is also a project management certification, the PMP (Project Management Professional), that is governed by the PMI (Project Management Institute). Gaining a PMP certification is becoming more important all the time and can definitely open a few doors that are otherwise closed without the certification.

You can implement project management principles within your organization fairly easily with a simple spreadsheet tool. To instill a project management discipline in your organization, you should do the following for each project of any significance:

- Define the project deliverables
- Define the resources required
- Staff
- Equipment & supplies
- Budget
- Outside contracted services
- Identify the tasks to be completed (What)
- Identify responsibilities for each task (Who)
- Define the timeframe tasks will be completed (When)
- Monitor the plan and communicate to all participants regularly

Defining the project deliverables is probably the most important part. Too many times, an IT Manager or staff member begins to work on a project when they haven't done anything to define and gain agreement on what will be delivered and what is required to end up with a successful effort. Take the time in the beginning to define a clear set of goals and deliverables, and get the signed approval you need to assure you and your customer agree. It will reduce heartburn.

Budget conservatively but not unrealistically. There will likely be problems or snags somewhere along the way. Anticipate the need for a certain amount of buffer needed in your project – both time and expense. No one likes it when you always finish late or exceed costs.

Developing the project plan can be a fairly simple process or it can be highly complex. Most projects can be kept simple and achieve positive results. A tool that I have used for years is available to you at www.mde.net/tools/project.xls . Feel free to download it and use it. The spreadsheet template requires Microsoft Excel and includes a small sample project with instructions on how to use it.

An excerpt from the download template is shown below:

2/7/01 *Sample*

Project: *New PC Setup (Project Example)*

Proj. Mgr.: *Roger Riley*

	ACTIVITY	Resp.		JAN				FEB					MAR					
			5	#	#	#		2	9	#	#		2	9	#	#	#	6
1	**I. Order**																	
2	A. Order PC, monitor, and printer	BB		X														
3	B. Order M/S Office and Marketing Database Software	BB		X														
4	C. Order paper, special forms, diskettes	BB		X														
5																		
6	**II. Installation**																	
7	A. Install PC and monitor	YS				X												
8	B. Load software	YS				X												
9	C. Install printer	YS				X												
10																		
11	**III. Training**																	
12	A. MS Office training	RR								/								
13	B. Marketing Database Software training	MM									/							
14																		
15	**IV. Client Prospect Database**																	
16	A. Create prospect database	WC											/	–	/			
17	B. Test mass mail merge capabilities of database with MS Word document	WC													/			
18	C. Create prospect letter	WC													/			
19	D. Create mass mail to top 1,000 prospects	WC														/		
20																		
21																		
22																		
23																		
24																		
25																		

You can easily see from the example above that all tasks are listed by major categories, the planned date is indicated by an "/", completed tasks are identified by an "X". Responsibilities are shown so there is no confusion who is responsible for each task, even if that person does not actually work on the task per se.

During project status meetings, it is very easy to go through the list quickly by going down through the column for this week's ending date (I always use the Friday of each week). Anything not checked needs to have an explanation concerning its status. You can also see what's coming up soon and can bring up key points that help complete future tasks on time.

A plan of this nature does several things for you:

- Gives you a good overall picture of the project status.
- Helps you hone in on the key tasks for the current status meeting.
- Helps you anticipate needs for tasks that are coming up soon.
- Indicates clear accountability to the project team.
- Allows everyone to be on the same page as you host your project status meetings.
- The status meetings create peer pressure incentive for everyone to complete their tasks.

Implement a project management discipline within your IT organization and you will begin to realize the importance of it because your projects are going to be more predictable in reaching target dates and staying within budget.

More information is available in the **IT Project Management** publication. More information on this and the other **IT Manager Development Series** publications is available at www.mde.net/cio .

Communication

Let's see, we have completed nine of the eleven key attributes that I identified that are important for any IT manager to be successful. Number ten is "Communication". To read any of the past nine articles on IT management, go to the newsletter index at www.mde.net/ezine .

Regardless of what you do in life, it probably doesn't amount to much if others don't know about it. What you communicate is key. In addition, the manner in which you convey good or bad news is equally important. And finally, how often you communicate with interested parties will have a bearing on your effectiveness.

What, , , How, , , When

What should an IT manager communicate?

For starters, how about a vision of where the IT organization is going? Everyone wants to know what your plans are, especially your own employees. Putting a "stake in the ground" in defining your goals for the organization and the projects you plan to accomplish for your clients is an important aspect of creating credibility. Delivering what you say you will is the other half of the credibility factor.

You need to communicate what you want from your employees. They can't deliver if they don't know exactly what you expect of them. You don't have to be so specific that you are micromanaging but be clear about what you're asking from each individual in your group.

Communicate to senior management what your expectations are that impact the company's budget and business plan. The CFO and CEO will be especially interested in anything that affects their ability to make the financial business plan they have established for the company.

Communicate the status of key projects to keep everyone aware of what's taking place and the progress you are making.

How should you communicate your message?

The format takes on a different approach depending upon who the audience is and what you are trying to communicate. For senior management meetings to discuss strategic vision of your IT organization, you need to meet with all senior managers that have a key interest in your message. A conference room with only a few slides are needed. Senior managers usually do not want or need a lot of detail so stick to the high points.

I always prefer to have weekly project status meetings. Often, you have to conduct them over a conference call with only part of the team sitting in front of you. When that occurs, you need materials that help you organize the project and communicate the status efficiently over the phone with all involved. A big part of the communication is the project status report that you send out to all members of the team prior to the status meeting.

Employee performance plans and reviews are best handled one on one with the individual. These sessions are some of the highest quality time that you have with your employee so take advantage of them. Performance plans and reviews are tools to help you motivate and direct the employee to achieve more for the team and for themselves.

When do you communicate?

How about often and more often?

Seriously though, you need to communicate your message as often as needed to manage everyone's expectations. As an IT manager, you have quite a few groups of expectations to manage and each group has a different perspective and need.

Senior management wants to know if you are going to meet budget and if their "pet" projects are getting completed as planned. If not, what are the implications to issues they have been planning?

Department heads within the company are interested in how well you are supporting their business units every day and whether their projects are getting paid attention to. The same is true of external clients that you might have that are not part of your company. If there are problems, both groups are looking for your communication as to how you plan to fix or improve the issue.

Employees need consistency and enough communication to know that there is a solid plan in place, that they are contributing to the needs of the company, and that they are progressing professionally. Employees also need to hear about company news and as their manager it is up to you to insure they get it. I always liked monthly staff meetings that blended a little company news, some education, and a lot of my management insight on what's working well and what's not and what we need to do to improve.

Effective communication from the IT manager position is not a luxury; it is an absolute requirement to achieve any level of success. Look for opportunities to communicate the good things that are happening and use mistakes or failures as a means to discuss areas of improvement in coaching your employees and your clients. That's right, part of the job is to help your clients better understand how to work with your IT department. Managing the client may be the toughest part of the job in many cases.

Use whatever means is available to communicate to all that have a need or are impacted by the IT organization. Presentations, e-mail, letters, lunch meetings, ice cream sessions all work to help you better your cause to achieve more success for your company and your employees.

For more on communication and other IT management topics, take a look at MDE's IT Manager Development Series at www.mde.net/cio .

IT Staff Motivation

Most surveys that provide insight into why employees leave their company or remain with a company indicate that it is usually not due to compensation. Sure, an exiting employee often cites the reason for leaving is because he/she is offered more money, but often that's a decoy to avoid any further discussion. In most cases, the new compensation is only slightly more, if any.

So why do people leave? A better question and the one I prefer to focus on is, "***Why do people stay?".***

First, let's consider the type of people we are talking about. A technical organization's staff is a different breed of person than most other organizations in a company. They should be considered in a group deemed as professionals and white collar workers versus those that fall into clerical, laborer, and blue collar workers. Technical employees are detail oriented which requires more understanding of "why", "when", and "who", and of course "what". Detail oriented employees can adapt to change but they have a strong sense of needing to know why the change is occurring and "what's in it for them" rather than just going along for the ride.

Second, employees in a technical organization work in a service segment of the company. The services may be provided to external clients or internal company departments. Either way, they provide services that affects and has impact on others. The other part of this is that they are normally a part of the company that does not generate real revenue for the company. Sometimes, this makes other departments look at the technology department as a necessary evil that should maintain as minimal of a cost to the company as possible.

Third, Information Technology (IT) employees deal with change every day. In addition, they do things that create change for others. When they execute well, things are good. When they don't consider the impact on the end user or make mistakes, it can become very interesting quickly.

Fourth, technical employees have a significant appetite to learn new things. Pay attention to it.

Lastly, IT employees tend to hear about the problems more than anything else. How many times has someone come running to your office, all excited, and can hardly wait to tell you, "The system is running great and we have been working productively all day; we appreciate what you do *sooooo* much!"? I think you get the message.

IT employees are professionals that need to know about their company's mission and direction. They tend to be conscientious and hard working but need to be focused just as any organization needs direction and focus. With all of this in mind, how do you create an environment that motivates technical employees to stay with you? It's easier than you might think.

Here are a few tips that have helped me in the past:

A. A vision for your IT organization and how that vision supports the company's objectives. Help them see their role and importance in the company's ability to succeed. If you don't have a vision and a plan, you'r late for the party. Get after it!

B. Everyone on the team should have a role and set of responsibilities. People can't be successful if they don't know what it takes to achieve success. Tie individual performance plans to team, organization, and company objectives.

C. Empower the individual to take responsibility and to use individual creativeness to achieve his/her objectives for the team.

D. Reinforce "team" every hour of every day. People want to be part of a winning team.

E. Develop an annual IT education plan. IT resources are strongly motivated by the ability to learn more. Feed this need; it is **the key** to retaining your staff. A good plan addresses skill gaps in the organization and builds depth in needed areas while making an investment in your employees. Fear that an employee will leave you after receiving education is not the fear you should have.

F. Conduct performance plans, reviews, and grant salary increases in a timely manner. It's a "meets requirement" management responsibility. People want and need to know how they are doing so don't miss out on this valuable management opportunity.

G. Meet with the entire staff regularly and update them on company issues, IT organization successes and challenges, and your coaching tips for improving the delivery of IT services. Open it up for individual question and answer sessions.

H. Insert fun items that show you care about being able to have fun along the way. It can be very simple:

I. Hand out ice cream sandwiches and popsicles in the middle of the afternoon.

J. Hand out impromptu awards for those that best exhibit the client service traits you are looking for from the staff.

K. Give an award for the "dumbest mistake" of the month. Be sure to include your own mistakes in the list.

L. Have a pizza lunch meeting.

M. Buy a roll of the new state quarters and give everyone a quarter so they can call you when they need to. I gave out 23 silver dollars to a small IT group in 1986 that to this day is still mentioned to me.

N. Treat your staff with respect.

O. Take the hit as the manager when something goes wrong and critique your employee behind closed doors.

P. Give credit to individuals and the teams rather than taking the credit yourself. People rally behind managers they respect and these two traits will gain you respect.

The key really is to include your employees into the true mission and plans of the company and to give them an opportunity to learn in order to do more for you. A motivated staff not only stays with you; it also performs at a higher level.

Develop a Career Plan

It's never too late to step back and take a look at your career, where you have come from, where you are, and especially where you want to be in five years. I have always had a question that I've asked my employees, "What do you want to be when you grow up?" I still ask myself that question often and I'm 52 years old, or "over half a century" as my son puts it. It doesn't mean that I'm still looking for a career; it just means that I analyze where I am often and whether I am living up to my potential.

I have been very fortunate in my career in that I have had many excellent mentors and role models. The five years that I was with IBM taught me the importance of performance planning and reviews. It also gave me a keen sense of the importance of providing excellent client service. Another company that helped me a lot was HBO & Company, now part of McKesson. Being associated with many quality people will help mold your management philosophy in the right direction. I owe a lot to many that I've been associated with throughout my career.

If you have never been part of developing a career plan, now is the time to start. You can use the following steps to develop a plan for yourself or for an employee.

Step 1 - Take an introspective look.
Before you put a plan together, step back and take a close look at what makes you happy. In other words, what type of work, or role, makes you want to "jump out of bed" in the morning and to get to your work as quickly as you can every day. Too often, people settle into types of work or roles that are not that interesting or fun for them but they do it "for the money". My sincere belief is that when you find your life's passion, the money will come. In fact, you may make more than you ever did in an unfulfilling job.

Money is not everything, certainly. My Dad never made a lot of money but he was one of the happiest people that I know and truly enjoyed his life as anyone that knew him will attest. When you look at yourself, focus in on the type of work or the lifestyle that makes you happy. Loving your work and the people that you work with makes life so much more enjoyable.

In coaching others about career planning, I always try to get them to focus on the type of work they like, and not the position or title. Many employees will say, "I want to be a manager.", and they do not have the slightest clue about what being a manager really entails. Too many people take jobs not because they really want them but because they believe that's what others expect of them. Career planning is very much about choosing the direction that you want to take in your life.

Step 2 - "What do you want to be when you grow up?"
To create a career plan, you have to look into the future. It's hard for many of us to do that; it's much easier to just sit back and take whatever comes available. You can get ahead that way but it's similar to floating down the river without a paddle. I prefer to set the goal, build a plan, and then "go for it".

Another thing that you need to contemplate is that once you determine what it is that you really want, you will need to develop a plan to get there. For example, if you are a network administrator today and you believe that you would make a good CIO some day and really want the opportunity to manage an organization, there are many paths that will get there. There are also paths that will block the entrance to the CIO door.

When you determine the type of work that you really want, talk to someone that's already doing this type of work. Ask very specific questions to learn all that you can about the nice parts of the work and the issues and problems. Remember, any type of work that you can choose has challenges; otherwise, everyone might be doing it.

Be honest with yourself. Visualize what your days will be like and what you have to do to be successful at this type of work. Evaluate honestly with yourself whether you have the initiative and perseverance to do this type of work with real passion. Wanting to be a CIO and liking to deal with the issues that a CIO must deal with are two separate issues. It's not all glory and the phrase, "It's lonely at the top." Was coined for a reason. Being the CIO for a growth company can be great fun as well.

Take the time and make the effort to look several years out. Simply looking at the next job is not really creating a career plan. You don't have to figure it all out today, but if you are truly interested in developing a real career plan, you have to start looking farther into the future.

Part of the reason for this is that when you begin to develop your plan, you want to take steps that keep doors open for future positions or roles that lead to your ultimate goal. Just taking the next job that materializes can actually limit or block access to the career work that you want. The sooner you decide what you want, the easier it will be to develop a realistic plan to get there. And remember, just because you decide on one direction today does not mean that you can't change it later. You may decide that you want nothing to do with management after experiencing your first management responsibility.

The best example that I can give you was when I was an IBM SE. My manager convinced me to become a salesman rather than move toward an SE Manager path because he knew that it would develop new skills and open additional doors that would position me for greater management roles in the future. The bottom line here is that he helped me realize the need to look at three or four positions into the future, not just the next one. I discovered that I didn't want to be a salesman but I'm convinced that what I learned as a salesman has helped me in my management career.

Step 3 - Create a plan.

To develop a career plan, you need three components:

- Where you are
- Career objective
- Paths to get there

It's always been easier for me to look at a picture or to take a 20,000-foot view of a situation. You can do the same thing in developing a career plan. Start by drawing yourself a series of three boxes in four rows and describe your current position in the middle box of the bottom row as shown in Figure 1.

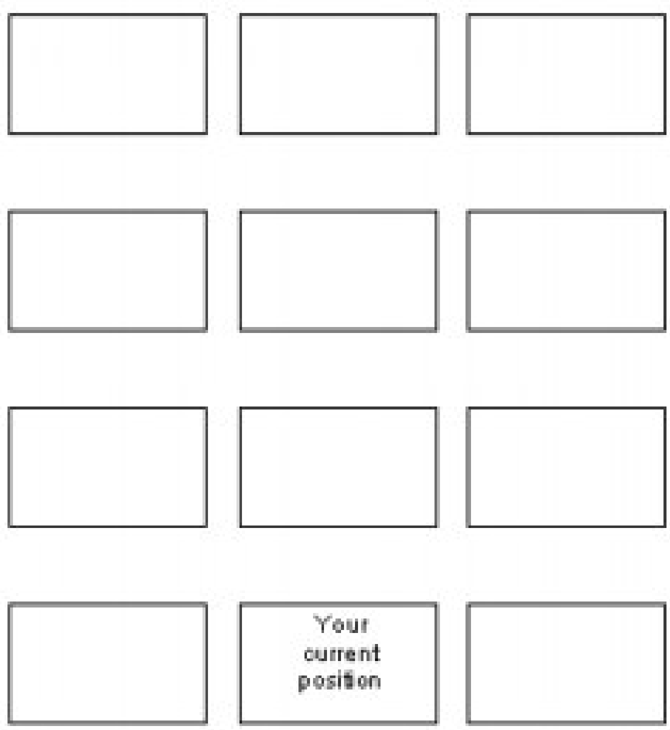


Figure 1

Let's use an example to illustrate. Assume that you are currently a network administrator and that you aspire to become a CIO. This is a bit of an extreme example but will help you visualize what we are discussing. When you take a close look at the paths that normally lead to the CIO position, you will discover that more CIO's come from IT managers of the business applications side of IT rather than the infrastructure side. Both paths are viable paths but a CIO must be able to relate business issues with technology solutions. Managing business applications development and support tend to prepare you more for that requirement.

Using the template in Figure 1, I have filled in typical technical and management positions in the boxes that will prepare one for the CIO position. Please note that this is an example. There are additional steps required to reach a CIO level that are not included simply for space.

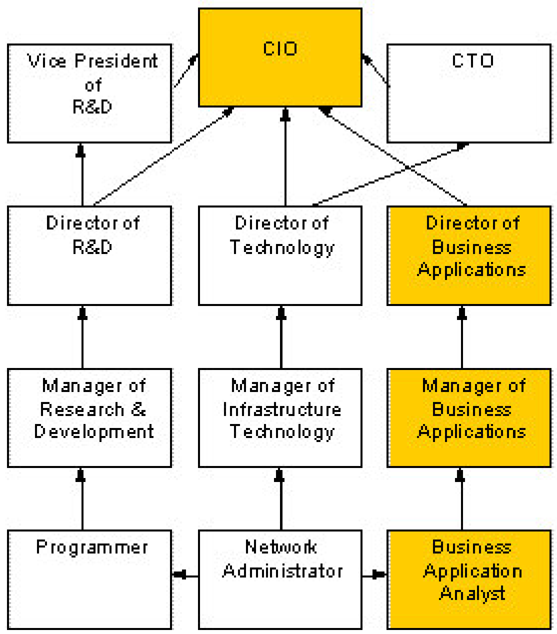


Figure 2

If you know that 70% or more CIO positions are filled from the Business Applications side, it's logical to pursue the path of the boxes that are filled in. Another route is to follow a vertical path that leads to Director of Technology. At this position, the possibility of filling a CIO role is more remote but the CTO position is a logical next step. From the CTO position, you can position yourself for the CIO role.

Nothing is cast in stone and qualified individuals will always break the norm. The example intends to show that there are many paths that lead to the CIO position but one path usually gets the desired promotion more than the others. The trick is to move into positions that keep your options open. Similar to when you started college, you may not know what you really want to major in as a Freshman so you take a general studies curriculum until it begins to become clear.

Career planning requires you to stop and to work out a plan that will work. Planning comes more difficult for some. Those that can establish a vision of where they want to be and are able to put the steps into a logical sequence more often reach their career goals.

If you are developing a plan for yourself, always seek the advice of your manager and others that would know about how to reach your desired goal. Not all managers are comfortable in developing a career plan for their employee. Don't let that prevent you from creating one yourself.

Performance Plans and Reviews are two of your best management tools

Do you dread the effort it takes to develop performance plans and later on conduct reviews of your staff? Most IT managers don't do it unless they are in an environment where it's required. If you are one that doesn't conduct formal performance planning sessions and reviews, you are missing one of the most valuable opportunities you have to define and coach your employees to improve your team's performance.

A friend of mine uses the phrase, "Anything worthwhile takes hard work and effort." Quite a bit. I'm not sure if he came up with it on his own or if it's a quote from someone else, but it has real meaning. I believe there are several reasons why managers don't develop performance plans or why they avoid conducting performance reviews:

- It takes work
- Don't know how to do it
- Procrastination
- Don't like confrontational situations
- Don't understand the value that these two "tools" have

About the most direct reports I've ever had was 25 although I've managed much larger organizations. All your direct reports need plans and reviews. With 25, that meant I had an average of two plans and two reviews a month to do. That's quite a lot of effort when you consider all the other things you need to do over the course of a month. My approach to help in my own productivity has been to develop a template for each employee type such as a programmer, application specialist, manager, computer operations, etc.

Develop Standard Performance Plan Templates
When you have a lot of employees and many have similar responsibilities such as programming, you don't need to develop a performance plan from scratch every time. In fact, you can develop a unique plan for each employee by starting with the same template. Let's use a Programmer Performance Plan as an example.

In my employee performance plans, I always to try to include the same categories:

A. Technical Knowledge & Productivity
B. Client Service
C. Teamwork/Leadership
D. Processes & Standards
E. Communication
F. Education/Training

I start by developing key performance points for each category until I have a standard Programmer Performance Plan Template. Once I have the standard, I save it and use it as the starting point for each new plan I develop for an individual programmer.

Individualize each plan
Every employee is different and has different strengths and weaknesses. A performance plan needs to be individually tailored for each individual to take advantage of that person's strengths and to help them improve in their weaker areas. My approach is to take the standard programmer template and read through each performance point of a category and then add, modify, or delete parts that are needed to develop a plan that fits the employee being worked on. I may add additional focus points that are needed for this particular employee to pay attention to, and I may emphasize key points of the plan. The goal is to ensure that your plan focuses in like a laser beam to give the employee the specific areas to pay attention to. Do a solid job and half your management battle is taken care of.

There are three ways you can emphasize a performance item within a category of the plan.

1. Elaborate on what you expect in writing.
2. Increase the evaluation weighting to a higher, more important level.
3. Emphasize the issue in your discussion when you give the plan to the employee.

The performance evaluation weighting factor is used to emphasize the importance that I as the manager place on each issue. I normally weight items with a 1,2 or 3 level rating with "1" being the most important. You can use any system you want but be sure to use something to place importance on the key issues you want focused on.

When completed, you have individualized the employee's plan by modifying the performance points in the original template and you have placed individual evaluation weighting importance on each point for that particular employee.

Delivering the plan is an excellent coaching opportunity to have with your employee. Just as team meetings are important to allow you to coach the team on objectives and improvements needed, the individual sessions are just as important to reinforce what is needed to be successful. The Performance Planning session with your employee is your chance to ensure there are no questions concerning what you are looking for to achieve successful performance. You don't want to miss this opportunity.

Deliver the performance review
Performance reviews are also very valuable opportunities to spend with your employee. In preparing for this session, I usually go through the employee's plan, pull out the notes I've put into the employee's file folder (both good and bad comments, notes, etc.). I spend at least an hour writing my review by making comments that pertain to each point in every category included in the plan. When improvement is needed, I provide specific examples and specific steps to take to improve the performance in a given area. You do not want to be vague. The clearer you can make your point the more likely you will obtain the desired result.

I also go back and review individual projects that the employee worked on and develop specific comments pertaining to my assessment of his/her performance. In some cases, I may even ask for other people's input on the employee's performance although I don't always tell them I'm preparing a review. Sometimes, people only tell you the good parts when they know you are preparing a review.

Each item is rated in one of five levels:

- 5 - Outstanding
- 4 - Exceeds Requirements
- 3 - Meets Requirements
- 2 - Needs Improvement
- 1 - Unsatisfactory

Place a grade value on each performance point in the plan from 1 to 5 with the 5 being for Outstanding. When you are through, add up the grades and you have an overall plan total plus totals for each major category. Multiply the total number of items that are graded by 3 and you have the benchmark for an average total performance rating that you can compare this individual's score to. For example, let's say you have 30 total performance items listed in the 6 categories of the plan. 30 times 3 (Average) =90; 30 times 4 (Exceeds) = 120; 30 times 5 (Outstanding) = 150, etc. So, a review that totals between 90 and 120 is an overall average performance review. A score of 120 and above but less than 150 is an overall Exceeds Requirements performance review, etc.

The most important part of performance planning and review sessions is the quality time it affords you with the employee. It shows them that you have a personal interest in their performance individually versus just as part of the team. Managers that take the time to develop and conduct performance plans and reviews without being forced get more accomplished through their employees. Take the opportunity you have to do this and see if you don't get a more focused organization.

Once you have developed standards for the types of employees you have, you will find that developing individualized plans for them in the future is actually quick and easy to do. I always try to leverage my time and this is one way that you can do it while other managers are still trying to figure it out. Your employees benefit by having more focus and clarity to their job, and you and your company will benefit by the improved performance.

Three Performance Plan Templates are included in the **IT Manager ToolKit**. Information is available at http://www.mde.net/cio/page13.html .

Vacation – Get your employee plans scheduled now.

Now is the time to confirm everyone's vacation schedules. Forgetting to do this may find your organization short staffed in the summer months or during the holidays. As a manager of an IT support organization, you must have a critical mass of staff on hand at any given time to support your business. Take proactive action by having all of your employees commit to a time when they plan to take time off.

Until you have confirmed dates, it's acceptable to make everyone aware that vacation schedules are contingent on having a minimal number and type of staff on hand at all times.

I approach this activity simply. I send out a notification that I need each person's vacation plans by a certain date. When I get the information, I post it onto a calendar that I maintain for those purposes. If there are conflicts that indicate too many of certain skills are planning to be out at the same time, I work through them with each person until I'm satisfied that the business is adequately supported.

The whole process takes very little time and insures that the business is supported and that you don't have to deal with surprises at the last minute.

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".

Kickoff your next project

I learned the value of starting a new project on the right foot many years ago as a young Systems Engineer (SE) at IBM. It was there that I was first introduced to a project management process, but in those days there really wasn't a formal discipline for PM as we have today. Even in those early years, it occurred to me that although every system installation was different, all of them had many of the same needs. I was also aware that to enhance my productivity, it made a lot of sense to develop a standard project approach to use for my first client meeting in order to develop the project quickly with them in a format that was easy to use. Remember, in the late seventies, I was often installing a small company's very first computer.

I didn't know it then, but what I developed was a project kickoff process that I would refine and use for the next twenty-five years. The first meeting you have with members participating in a new project is a critical component to the success or failure of the project. Approach it in an organized fashion with all your "ducks in a row" and you establish your leadership skills right up front as well as your emphasis on being organized and prepared.

As a young SE, I developed a comprehensive project plan template that I used many times. It had every task I thought was necessary to install a new computer and the business application(s) that the company had purchased from IBM. The template included a column for responsibility and for weekly completion timeframes. The responsibilities that I knew were mine already had an "I" filled in to designate IBM. Those tasks that I knew to be the client's were left open until the kickoff meeting. In addition, all of the task completion due dates were left blank until the kickoff meeting.

The kickoff meeting was my first project meeting with the client. Often, it was my very first meeting with them unless I was involved in the sales process. I approached the kickoff meeting as the critical part of achieving success in the project. The meeting was used to get to know one another and to develop the project plan. I used the template as a guide to help streamline the meeting. As I said earlier, every installation is unique but all of them had to order supplies, prepare the office for the computer, load master file data, etc. before going "live".

The kickoff meeting allowed me to go step by step through the entire project as we updated the responsibilities and task due dates together. Often, tasks were added as unique activities were identified during the course of the meeting. By the end of the meeting, we always had a comprehensive plan of attack that I felt comfortable with. The entire meeting normally took about an hour but we would spend three hours if necessary to complete the plan so that we were all comfortable with the steps to take, the responsibilities, and the timing.

Every time I wrapped up one of those kickoff meetings, the client came away from the meeting with several things:

- a strong sense of knowing exactly what had to be done, by whom, and when
- empowered by the knowledge and understanding of how the project would be completed
- sense of confidence in my leadership and capability of completing the project successfully
- commitment because the client was part of creating the actual plan
- a sense of IBM and the client being on the same team

These last two parts are key. My approach is to involve the client in the development of the project. I develop the main part of the project plan (the tasks) but leave the dates and responsibilities out so these parts can be developed with the client. I find that a client is much more committed when he/she has had a hand in developing the due dates and responsibilities.

Kickoff meetings can empower the group or they can create concern. Prepare and organize the meeting in a way that establishes your leadership and your odds of success go up exponentially.

Budget Time: Tips to build an achievable plan

It's getting that time of year again - budget preparation for next year's business plan. Nothing "bugs" a company CEO or CFO more than having a manager on the team that does not know how to build an aggressive plan that can be accomplished. After all, both of these two executives are measured more on the financial performance of the company than anything else.

As a manager of IT, you are charged with many facets of managing the technology resources of the company. One of the most important responsibilities is fiscal management. Your CEO and CFO have every right to expect you to be able to build a plan that is construed to be aggressive but one that you can achieve. This article will include a few tricks to help you in this area.

I've seen two types of "budgeting managers". One is what I call the "Exact Budgeter". The second is the "Reliable Budgeter". The "Exact Budgeter" does all that he can to produce a precise budget that is as accurate as he/she can be. This manager believes that he excels and is considered a strong manager by being as precise as he can be so he builds a very tight plan that if everything goes according to plan will be an outstanding budgeting effort.

BIG PROBLEM - things don't always go according to plan, especially in Information Technology.

The "Reliable Budgeter" intentionally builds buffer into the plan because he knows that things change over time and that surprises can and do happen. By building in buffer elements, this manager has room for mistakes and unusual occurrences that might happen. The "Reliable Budgeter" almost always completes his actual year within his budgeted plan. The "Exact Budgeter" almost never does although when he delivers his budget plan at the end of the budget preparation phase, he is certainly proud of such a great job he did.

Your CEO and CFO need you to sign up for a plan that you can achieve. They always prefer to have an IT Manager or CIO that delivers what he/she says can and will be done and that knows how to anticipate the obstacles that occur in all companies.

Here are a few tips on how to build in operating expense budget buffer that will help you achieve more success in managing your fiscal responsibility.

- Build in new staff hires in the month you think you will hire them. Budget earlier, not later in the year if you aren't sure. Invariably, you will actually hire later than you plan and you will have expense buffer built into your plan as a result. In some cases, you may not hire certain positions.
- Include recruiting fees of 15-20% for all new hires. I prefer to hire from referrals and to avoid recruiting fees but by having your plan built in this manner, you will have added expense buffer.
- Estimate your training and education expenses by using a flat fee per year for every employee. You won't need to spend the same amount in education for all employees but you have it planned if you need the money.
- Take a close look at all projects that you anticipate for the new year. Budget reasonable consulting fees, temporary staff, and other technology resources as needed for each project. Your project plans may change during the coming year but when you have expenses planned for every project, it usually covers new projects that replace projects in your projected business plan.
- Build in planned salary increases, bonuses, and other incentives that you expect to pay.
- Plan conservatively when adding or deleting WAN lines and associated expenses (both timing and costs).
- Anticipate 10% software and hardware maintenance increases and do a thorough job of keeping records of all expenses in this category so you have it all covered.

- Take a look at last year's actual monthly expenses and look for "exception expenses". When you discover what they are, determine if you need to include a budget expense for things like it in the coming year. Past history trends and surprises are excellent tools to help you anticipate the future.
- Estimate conservatively for travel and lodging expenses. Look closely at each employee's travel needs.

These tips will get you started. If you are interested in more insight into budgeting for IT, you may want to take a look at my book, **Developing an IT Business Plan**. It's all about the process of budgeting for IT and includes several templates and tools to help you budget effectively. More information on this book is available at http://www.mde.net/cio/page9.html.

Plan your IT strategy before building a budget

We are in the middle of "budgeting season" for most companies. I have written several articles and a book to help IT managers budget effectively. It is actually an easy process once you have a few concepts down. Most managers dread budgeting because of a lack of understanding their business in financial terms or because they simply don't know the tricks of budgeting effectively. A few tips were included in my August newsletter.

I have also written a few articles for TechRepublic and provided free download tools to help IT managers in their budgeting efforts. A list of all my published articles is maintained in the ARTICLES section on my web site.

In this month's newsletter article, I want to emphasize the need for you to define your business strategy for next year before you build your department's operational budget. Developing an IT strategy requires focus and a fair amount of work just like anything worthwhile. Avoiding to focus on developing your strategy for next year puts you at big risk in achieving your next year's business plan, or budget.

Strategy is the key to your budgeting assumptions
Defining your major IT initiatives for next year does three important things for you:

- It sets senior management's expectations.
- It allows you to validate what the key initiatives need to be for the coming year.
- It gives you insight on what you need to budget for in terms of manpower, equipment, software, etc.

It isn't necessary to identify every project initiative 100%. But, if you take the time to target next year's major projects and then make the effort to estimate what you believe to be the financial requirements of each project, you have taken a major step in laying the groundwork for most of your significant expenses. These are the surprise expenses that cause most IT managers to exceed their budget when they don't know what to expect.

Developing an IT strategy does not come naturally for most IT managers. People tend to have a reactive nature as opposed to a proactive planning ability. It's just easier to react to a problem than it is to force yourself to develop a plan, so most people take the easy route. By developing a strategy for your IT organization, whether it be the programming support group or an entire IT Organization of a thousand employees, you will set yourself apart from your counterparts.

Key elements to a strategic plan
Keep it simple. An effective IT strategy does not have to be complex. Include the following components and you will have what you need for this phase of "forecasting". It provides excellent insight for your budgeting process.

- Project Initiative
- ROI (Return on Investment)
- Benefits
- Estimated timeframe and duration of time the project will be implemented
- Project costs
- Employee cost
- Equipment, software, and supplies cost
- Consulting and external resources cost
- Company resource requirements and timing (staff, equipment, etc.)
- Prerequisite issues

Draw a picture
It always helps me when I can visualize strategic initiatives in context with one another, ie. To be able to see everything from 10,000 feet. Go to http://www.mde.net/strategy to take a look at a simple 2-page plan I developed to help senior management visualize a strategy to take the company from a predominately paper driven company to a "paperless" environment. I did not include timeframes in this particular presentation but it helped me establish several perspectives:

- There was a clear path from where we were to where we wanted to be.
- It required a significant amount of effort and commitment.
- Multiple projects can be implemented simultaneously.
- Certain projects have to be completed before others are started.
- To succeed requires excellent planning and coordination.
- Certain projects are optional and can be postponed or eliminated altogether.

Developing a strategy helps you budget more accurately and gives you insight that increases your ability to budget in a way that increases the likelihood of you achieving your financial forecast tenfold. I never miss the opportunity to develop an IT strategy before I try to budget for my operation. It is just too risky.

Develop your IT staff education plan for next year

One of the strongest reasons IT employees stay with a company is because they are challenged and have an opportunity to learn. Money is not the primary driver for people leaving their company as many would like to think. Even in this softer economy, you want to do the things that protect your organization from employees leaving prematurely. In any economy, it is difficult and downright painful to replace star performers.

In a soft economy, training and education are usually the first budget items to be cut. Unfortunately, this may be the most important tool you have to develop a stronger team capable of achieving greater results for your company. Even so, there is a lot you can do to provide your employees opportunities to learn and to develop their capabilities.

Two key tips are to keep everyone busy and focused on tangible activities that have real value for the company. When people are busy, they have a lot less time to complain. Plus, most of us like to be challenged and busy. The second tip is to develop a focused education plan for your staff.

A good IT education plan addresses two key needs of the IT organization:

- Fills expertise gaps
- Develops bench strength in key skill areas

How do you go about developing an effective IT education plan ?

Define your needs
The first step is to define what your organization's capability needs are. In any IT organization, there are gaps in specific expertise or experience that are important to support the company to the fullest. You don't need experts in every area; many skills can be outsourced if necessary. Take a look at the company's core competencies and be sure you have experts in all key areas that support these core competencies. In addition to filling skill gaps, determine where you need additional capacity in important skills areas of your organization. Critical skill areas need backup in case your expert employee leaves, gets sick, or has to be out for an extended time. Don't be the team that can't move the ball down the field when the starting quarterback gets hurt.

Quantify what you have
Determine where you have experts and where you have sufficient backup capability. One way to do this is to use an Employee Skills Matrix that I developed years ago and is part of my IT Manager ToolKit. An article was published on TechRepublic that provides additional insight. Click here to read it and to obtain your free download of this tool.

The differences define the education needed
After you compare what your organization needs with the skills and capabilities you have, the variance tells you where you need to focus an education plan. Make a list of specific training classes to address skill gaps. After you have this list, identify classes for your employees that make sense.

When done with this part, review each employee to define an educational plan designed to help him/her improve skills for the benefit of the organization and the company. Don't forget soft skills such as communication, client service, leadership, and organizational skills. When completed, every employee should have a defined plan of education for next year.

Creating a culture that shows your employees that you are interested and committed to their professional development goes a long way toward creating a team that is committed to your company.

You don’t always have to send employees to formal training classes. Other options offer excellent benefits including bringing in a speaker, self study classes, books, and educational materials designed to address the areas of training you need. You can even provide some of the training yourself or use resources within the organization. You might be surprised at how economical a comprehensive plan can be. The key is to develop a targeted training agenda that helps improve the organization’s capabilities.

Set your goals for next year

Yes, it is that time of the year again - end of the year. Time to take a look at the last 12 month's accomplishments and to define what you want to accomplish next year. It is something that I have done consistently my entire career which is a much longer period of time than I care to think about.

What's all the fuss about?
It's really not a big deal whether you go through this effort or not, but I can tell you that I'm totally convinced that developing annual goals has helped me achieve much more in my career than I would have without doing it. How can I be so sure? Simple, I take a look at past goals every now and then and I can see the achievements that were made. It's a given that when you write a goal down and review it often so it stays in the forefront of your mind, you are much more likely to accomplish it.

Decide what you want in life
I believe that to achieve anything you need to decide what it is that you want. Sure, we all daydream on occasion and think about what we would do when we win the lottery, but here I'm talking about specific objectives that are within your grasp if you decide to "go for it". Take time to develop two lists, one for your business career and one for your personal life. Both are important and worth taking the time to identify. I usually have about ten to fifteen goals when the lists are combined.

Some goals may be achievable and are ultimate accomplishments that you want while others are stepping stones toward a greater goal. Both types are important and worth listing. Believe me, looking back on your annual lists and seeing that many of your objectives have come to pass is very gratifying and creates a real sense of accomplishment.

Develop a plan
While you're at it, take thirty minutes and develop a quick plan of attack and put dates on the tasks that are necessary to accomplish each goal. When you start getting specific, you begin placing real emphasis on your commitment to follow-up and to complete your list. Keep your list handy so you see it often. Reminding yourself of what you want is great reinforcement that will help you reach your objectives.

Tell someone about your objectives
Again, another reinforcement that helps you commit to your objectives is to share them with others. It could be your management team, employees, spouse, children, or good friends. The point is that following up is the hard part and you need to create as much incentive as you can to do the work necessary to achieve each of your goals.

Take periodic status checks
Make a real effort to assess the status of your plan at least quarterly during the year. Monthly is even better. If you really want something worthwhile, you have to put forth the effort. Nothing in life is really free. Even when you get a free book like I give people that join my newsletter list, you still have to read the material and do something with it to gain the benefits. Staying abreast of where you stand on each objective keeps you 'in the game' and lets you determine whether the goal is still a valid one or not. If not, scratch it off the list and move on.

Results are the proof
Where I live, where I play golf, having a home based business, and many, many other things are all goals that I've written down in the past. You can't tell me that there isn't a connection in there somewhere.

Good luck and best of success in reaching your goals for next year.

Staff meetings are worth the time

Contrary to what a lot of people believe, staff meetings do not have to be a waste of everyone's time. In fact, a well run monthly staff meeting can have many benefits for your IT organization.

As a young IBM Systems Engineer, monthly staff meetings were great breaks from the daily work pressures. It was there that I learned the value of a properly conducted staff meeting. Since those early days in the late seventies, I have incorporated regularly scheduled staff meetings to help me accomplish many things with my IT organization including:

- Keeping staff informed of company events & issues
- Reinforcing teamwork
- Coaching on key points
- Providing group education
- Building camaraderie within the IT group
- Recognizing successes and achievement
- Having fun

You need to balance the impact on productivity against what you gain by having a meeting. Fifty employees out for two hours in a meeting is potentially 100 hours of lost time, maybe even lost billable time. That's a hit against your organization's output or billable revenue to be sure.

On the flip side, I find that getting everyone together once a month keeps them informed and allows you to emphasize key issues that need their focus. The bottom line is that it helps you manage the output of their productivity potential. Informed employees that know their manager realizes the importance of both hard work and having fun tend to be more motivated. Highly motivated employees produce more in a 40-hour work week than those that are not.

In difficult situations, I have met with employees every week until the changes that were needed took place. In a turnaround situation, you have to change the existing culture of the organization. To do that, you need to communicate a lot and often. Doing it so that everyone hears the same message is an effective way to create the team that you want them to be.

When I hear employees or managers make statements that meetings are a waste of time, one of two things is happening. The meetings lack substance and are held simply to meet or the person doesn't realize the peripheral benefits that are taking place by keeping the team informed.

If it isn't broken, don't fix it

I can't tell you how many times I've seen an IT organization conjure up a project just for the sake of doing something they wanted to do. Never mind what the company or their clients really need, "let's go do something really 'neat'" seems to be the theme of the day.

Let me give you a specific example. I conducted an IT assessment for a small manufacturing company last year. The CEO called me in because his IT organization was proposing a $380,000 network upgrade. The CEO had questions as to whether he really needed to spend that kind of money on their network, he wanted to believe in his IT staff, but he had discomfort with the proposal and couldn't put a finger on it.

This scenario takes place thousands of times every day all over the world. Bringing in a consultant is not what the CEO really wants to do. For one thing, it casts doubt on the IT organization. Another issue is that it's not cheap, , or is it?

Let's say getting an objective opinion can be one of the most inexpensive investments a company can make and may turn out to be one of the best values you can get. In this particular case, we saved the company over $300,000 by doing a simple 2-week IT assessment.

The problem was that the IT staff was managed by a manager that had minimal experience in management but lots of knowledge and experience in networks. As a result, the projects he focused the IT group on tended to be infrastructure related. The good news here was that the network infrastructure was exemplary and had a minimum of 99.8% uptime. The data center was as organized and stable as any I have ever seen - truly excellent. It also had significant scalability due to some recent staff downsizing. Sound familiar?

On the other hand, users were irate about the support from IT. The problem was simple and so was the solution. IT placed priority on the technology (networks and servers) and not on the user (business applications and Help Desk). My recommendation was to scratch the network upgrade and focus attention on the business applications where the company could gain real value from its IT investment.

The bottom line is that we didn't fix what was working, saved the company significant dollars, and focused the IT group in areas that improved the company's earnings in a very short amount of time. Remember, ***"Don't fix what isn't broken.".***

Education is key, even for the IT Manager

Knowledge is power and positions you to achieve greater levels of success. Over the years, I've watched the light bulb go on for an IT manager I was coaching on a particular management issue. I'm sure that my mentors saw the same effect with me.

Managing effectively at a high level is something most of us can do if we know what to do and how to go about it. Management techniques and processes can be learned just as a programmer learns how to incorporate a new routine of code into his coding arsenal.

I've seen other managers look amazed at the fact that I can submit an IT budget for a large organization in record time and that I never fail to achieve my operating budget.

I've seen employees light up by being part of a successful and motivated organization while others on the outside were looking in wishing they were part of it.

These things are easy when you know what to do and how to go about it. I didn't invent all of these tips and techniques but I've done one of the best jobs in the industry in packaging them in a set of ten books for my **IT Manager Development Series** .

I remember learning how to install a new mini-computer system with business application software for a new IBM customer. It didn't take me long to incorporate a systems installation project template that I could use for every new installation. All I had to do was identify the responsible person for each task, put in dates for the tasks to be completed, add a few new tasks and it was ready to go.

This simple process saved me countless hours of work, organized each project, and gave the client a tremendous feeling of security because of the specifics all laid out and the confidence I had in knowing my projects worked. And this was well before structured project management programs came into vogue.

I certainly didn't invent the new installation project plan IBM taught me, but I learned quickly how to use and improve it to boost my productivity and to ensure we accomplished the mission. I consider it the key to why I successfully installed 13 systems that year and received an IBM Regional Manager's Award. Knowledge truly helps you succeed.

The reason I put the **IT Manager Development Series** and **IT Manager ToolKit** together was to extend my reach to IT managers all over the world. To date the materials have been sold in 52 countries with excellent reviews and feedback.

If you haven't purchased a copy, you owe it to yourself and your career to take a look before the price is increased. Practical insight that is guaranteed to help you achieve more or your money back.

Take a closer look.

When cutting IT expenses, be careful not to cut muscle

The big movement for well over a year now has been to cut expenses and reduce the cost of operations. The IT department has not been immune to this push from the top of companies nor should it be.

When revenues decline, stockholders still expect the companies they invest in to operate profitably and to keep the stock price up. As we all know, stocks have taken a beating in the last two years--just look at your 401k statement. The pressure for earnings has a renewed focus.

I'm a strong proponent of managing company expenses in line with revenues. I'm also a supporter of managing IT expense as a percent of company revenue.

The problem comes into play when cost cutting initiatives cut into muscle as opposed to eliminating "fat". There are critical resource requirements to provide even the most basic level of technology support. In normal cases, a few areas need to have some amount of backup or depth in case a key member of the team leaves for some reason.

When you begin any cost cutting initiative, you should take a very close look at the support needs of the company and how you are organized to provide that support. Identify critical support requirements that must be in place to support core competencies of the company, i.e. the IT "muscle".

Carve these key resources and expenses related to the support they provide out of your list of potential cost cuts. By identifying the true "muscle" of your IT organization, you help ensure that the primary business support need will be taken care of. Be objective and validate with senior management.

If you have "star" staff members in areas that are being looked at to be eliminated, consider shifting them to your core competency support areas. The team you want to end up with is the very best of the staff you have today and when you have to eliminate staff, you owe it to your team and the company to lose the weakest of the bunch. You must stay objective when doing this - it is a tough assignment.

Always try to find business opportunities that allow you to make IT investments that save the company much more than what will be saved by cutting IT expense. Most companies have these opportunities but if you wait until the "cost cutting" message comes down, it is too late.

Managers *earn* respect; it doesn't come with title

How many times have you heard a manager tell someone they have to do something because "I'm the Manager."? I learned early on as a young Marine that I can give an order and the troops will carry it out but when they respect you, it's done with a whole lot more enthusiasm and quality.

Title gives you nothing more than to say you have a responsibility for something. Employees, especially bright technical employees don't just "sit up and speak" when asked to because you are the "manager". They take their cues and make their moves based upon how their leader motivates them to. Often that motivation is unnoticed by the manager or an unintentional act that has a significant impact on a staff member or the entire staff.

Little things like showing respect for people, taking the "hit" when the organization or someone in it fails, stepping up to a difficult employee situation, and giving the team and individual staff members credit for successes are all subtle things that leaders do. It's what makes people want to follow and go the extra mile for you.

Managers lead by example ever day of the week. Never forget that eyes are watching you to determine how they should react to situations and they are learning from you all the time, , , even when you don't expect it.

I had a former employee share an event with me many years after he had worked for me. The event had to do with something I did in a staff meeting that I couldn't even recall, but it had a profound impact on him and became something that he incorporated into his own management style years later.

They are watching, learning, and replicating your actions and behavior into their own approaches. Managers earn respect by action, not words or foolish things called titles.

You owe it to every member of your staff to set the right tone and example in work ethic, treatment of others, and teamwork. It will repay you many times over.

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!

You set the “attitude tone” for your IT staff

As the Manager of IT you create an attitude toward your clients and technology users that you may not be aware of.

Your employees look to you for the lead and when they see you complain about User problems, company politics, policies that you disagree with, etc. they will actually begin mirroring your attitude toward these same issues.

It’s the manager’s role to set a positive tone and to help create a positive work environment for all employees. This doesn’t mean you have to like every new policy or that you shouldn’t be concerned about how some User Departments deal with technology support.

What it does mean is that when you have issues, you need to try to handle them “behind closed doors” versus in the open where your employees hear your tone and dissatisfaction.

Got a policy that you don’t like but one senior management says must be enforced? Voice your concern with senior management in the proper place but never use your employees to share your disagreements. Your staff member’s first inclination will be to support your position and in the long run that may be the wrong thing for all.

There is a reason why we are all coached to discipline an employee one-on-one versus in front of others. This same reasoning applies to how you should present yourself to your employees and clients/users when dealing with difficult issues.

Always be mindful of the impact you have on others when you are dealing with these difficult situations. Your staff and clients observe your behavior and if it’s all right for the manager they naturally assume it must be ok for the rest.

Your position has more impact on your company’s culture and the behavior of employees around you than you might think so take time to think through your options before taking action and consider the impact it has on those around you.

Find your replacement—a top priority

You hear it all the time but too many managers limit their opportunity by failing to identify their replacement. Not only should you identify valid candidates, you need to take steps to develop their expertise and experience so that when the opportunity comes, they can do a credible job.

After all, they may be reporting to you.

It's in your best interest to position a replacement for several reasons:

- You have an obligation to do what's best for your company.
- Developing a strong team shows maturity and capability on your part
- Positions you for promotion.

I can't tell you how many times I've had conversations with other senior managers about a young manager's potential to be promoted and we have to pass because it would cause too much challenge when they don't have anyone that can fill their spot. We move on to other candidates that are better prepared to leave their organization.

Finding your replacement should start as soon as you take the new job. This doesn't mean they have to be in place right away. It does mean that you should start determining if anyone can grow to take on the job at some point and how you would begin developing their capabilities.

If you have no candidates, you should be finding one when you have a chance to hire additional people into your staff.

Senior Managers want organizations that run pretty much on their own. Pulling out an excellent manager to give him or her more opportunity gets blocked when your team can't run independently and smooth after you leave it.

Mature managers position their organizations to be able to run without them. Managers who are less mature or insecure build teams that become very dependent upon them.

Senior managers recognize the difference and that's why some people advance and others don't.

Client service is a process, not an event

Better said, excellent client service is a culture, not a project. Sure, you may initiate specific projects or install a process to improve the levels of client service you provide, but organizations that live and breathe doing the things that improves client relations truly stand out from the crowd.

You've heard me say in past articles that it all starts with the IT Manager. When you "walk the walk" and "talk the talk" and act as though you understand what's important in helping your technology clients, it carries throughout your IT Organization.

Not only that, it spreads to other organizations in the company and even to external clients if you have them.

What's great is that great client service does spread out to those you touch. The flip side is that poor client service does the same thing and with significantly more adverse impact.

What's the old saying? Make a client angry and he or she tells at least 20 other people? Well, it holds true in the IT world as well.

I'll be the first to tell you that not all of my IT Organizations were considered to have excellent client service. What I can tell you for certain is that you never achieve great relations with your client unless you are making proactive efforts to help them achieve their objectives.

That's actually what client service is all about: helping others do their job as productively and painlessly as possible.

OK, so how do we begin?

First, determine what it takes to be considered a "world class" client service organization in your company.

To do this, you have to go ask those that you support. Organizations that rely on technology are interested in the following key areas:

- Focus on their priorities
- Anticipate their needs
- Be responsive to their requests
- Keep them "out of the dark"
- Provide high systems "uptime" and availability
- Be cost effective
- Fix it and fix it right the first time

I'm sure none of this is a surprise. Take these "wants" and formulate your own questions to determine if you are providing support services that address these needs.

The answers will lead you to issues that define where you need to focus energy to improve client service. For example, if your clients are telling you that you aren't working on their priorities, find out what the priorities are and refocus your organization's efforts.

Likewise, implement processes that help you become a more responsive support organization if you hear things like, "We never know the status of our projects." Or one of my favorites, "It's like sending a request to a 'black hole'."

It's really not hard, but it takes a conscientious effort to understand what your customer needs and how well you are doing in meeting those needs. Once you know, it's a matter of doing things that address specific needs.

Create a targeted "client service project initiative" and watch the relationships improve. Don't try to do this alone. It helps when you have other department managers involved in your crusade and they like the fact you are doing this to help them.

The result can be a big "win-win" for everyone involved.

"War Stories"

We all have personal experiences that make good "stories" and have valuable lessons. Some of the most valuable lessons I've learned have been difficult situations, events that will never be forgotten, even funny circumstances that make a lasting impression.

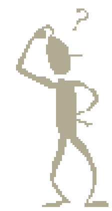
Two diskettes are too many

In the early 1980's, I learned a valuable lesson about phone communication and how easy it is for the person on the other end to "go right" when you want them to "go left".

While sitting in as a guest client support rep for one of IBM's business applications, I received a call from a lady in the mid-West who needed help. She was a new computer user and her system, an IBM System-32, used those big 5 1/4" diskettes at the time for data backup and for new software medium. Most of you don't remember those days but it was a great advance from tape drives and punched cards.

She was trying to run her daily backup process but the system was giving her an error message. Her description of the error sounded like she had inserted the wrong diskette into the system. The system had a process of numbering diskettes sequentially for it's backup and the message sounded like maybe she had inserted the second or the third diskette instead of the first one in the sequence.

This didn't sound like a big problem so making the assumption that she just had the diskettes out of their proper order, I asked her to insert the next diskette into the system. I was going to solve this problem in record time.



She did as I asked and after a short pause told me that she had another error. My initial thought was that we still had not found the first diskette of the group. One difference this time was that the error message she described sounded more like a hardware problem.

Uh-oh, here goes my quick fix idea down the drain.

Thinking that we were still looking for the first diskette of the sequence, I told her to insert the third diskette. There was a longer pause this time, , ,it was total silence. I asked her what was wrong and I will never forget those insightful words, "I can't put another diskette into the slot; there are two in there already and another one just won't fit."

Lesson learned:
When giving directions over the phone, be very specific and don't leave steps out. Instruct a person just as you would a computer to complete a task. Every step is required.

Where are your 'backup diskettes' ?

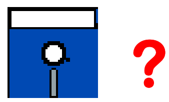
Back in the early days of minicomputers, IBM introduced systems that used diskettes for backup instead of tapes that had been used for 20 years. The minicomputer brought into the fray a whole new type of client - the "first time user".

A great lesson I learned in those days was to inspect closely to absolutely insure your client understands what you are saying.

It all began when I went to a client that I had inherited from an SE (IBM Systems Engineer) that had moved onto new opportunities. My objective was to help the client upgrade to a newer disk drive that had more capacity.

This particular upgrade required both a reinstall of the operating system and a restore of the client's data. My job was to prepare the client for the disk swap when the CE arrived and after the hardware change was in place to restore the system for operation. No big deal and I had done many before.

After talking through the steps to be taken with the client, I asked about their Systems Backup and their File Backup at which point they told me they were in the file cabinets stored away. All systems 'GO'.



The CE swaps out the disk drive and hands the project back over to me. I immediately ask the client for their Systems Backup and for their Data Backup and get the reply, "What's a System Backup".

Yep, you guessed it, , , they didn't have an Operating System backup, or at least none we could find. In normal circumstances, this would be ok but today I didn't have a copy with me so I could reload the O/S.

I had to call our office 150 miles away and get a copy sent to me so I could finish the job the next day. Later the next day, the O/S software I needed arrived, I reloaded the system (took an hour versus the 10 minutes it should have taken) and I completed the job. The client lost about 4 more hours of uptime than necessary but the biggest problem I had was the ridicule dished out by my IBM 'buddies'.

It gave me a keen sense of inspecting answers from clients to be sure that what I think I have, I really do have.

Raised floor effect

In the late seventies I was a young Systems Engineer for IBM. We had just sold a Time and Attendance system to a large hospital in Mississippi that I was to install. The Sales Rep took me out to the hospital to introduce me to the CIO and for me to do my preliminary assessment work to start planning the project.

As we walked through the corridors of the hospital on our way to the CIO's office, we passed a door with a concrete ramp leading up to it. The door had a sign that said:

COMPUTER ROOM
AUTHORIZED PERSONNEL ONLY

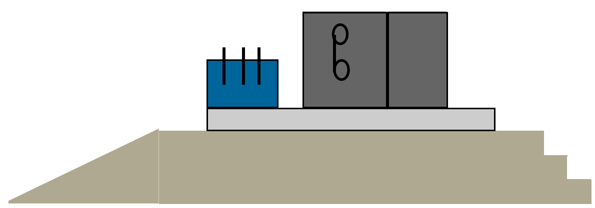
It made sense that the computer room would be elevated since we were on the main floor of the building and this part of the country was known for flooding problems.

We reached the CIO's office and started getting to know one another. Before long he asked Jim, the Sales Rep, if he had told me the story about the computer room. His answer was, "No, I thought I'd let you do that." I'll never forget what I was about to learn.

The CIO begins to tell me that when the hospital ordered their Honeywell mainframe several years earlier that the Sales Rep instructed them to install a 2-foot raised floor for the computer room. The hospital's former CIO stated that he understood so they set up a time to do the final inspection before the equipment would ship.

About three weeks later the Sales Rep and his technical resource arrive at the hospital for the pre-installation review. On their trip back to the CIO's office they notice the concrete ramp leading into the computer room. When they meet with the CIO, they all start checking off the list of "to-do's" and prepare to do a walk through to inspect the work.

Upon reaching the computer room from another internal door just past the CIO's office, they notice there are now two steps leading up to the room itself. They open the door and discover that the CIO had indeed raised the floor of the computer room. He had a 2-foot slab of concrete poured in the entire computer room to "raise the floor". It became immediately clear that he really didn't understand the concept of a raised computer floor after all.



They now had to rush an order and installation of a true raised floor to hide cables and wiring for the mainframe. When you walked up into the computer room, you saw a raised floor for the mainframe and system printers on top of the concrete "raised floor" for many years.

The lesson

Don't assume the other person knows what you are talking about. Not only did the customer lose money, the positive relationship he had with his vendor became strained. I never did hear why the former CIO of the hospital left and always wondered if it had something to do with this "war story" event.

Another lesson is that you need to inspect events that are potentially costly and when someone is treading on new ground closely. It can save you time, money, and maybe even your reputation.

In this case, both the Sales Rep and the CIO missed the boat. Either one of them could have inspected the issue more closely and saved the cost and embarrassment of this blunder. But, if they had done that I wouldn't have this funny "war story" to share with you.

This is one lesson I was fortunate to learn at someone else's expense.

Is it a "bad employee" or something else?

I joined a company many years ago as the new CIO and as I normally do began my own IT assessment. My approach in assessing a company's technology situation is to begin with senior management, work my way through company departments that use technology supported by IT, and finally go to the IT organization to complete the assessment.

In this case, I heard several people in the Corporate departments describe an IT employee as being unreliable, never sure where she is, slow to complete any project, and on and on. On the other hand, the operational staff in the remote offices had high praise for her.

There was a big push from the corporate departments to fire her as she was just "no good".

Upon further review, it became clear that the problem was a management issue and not an employee issue. The problems the corporate departments were having stemmed from the fact that this one person was trying to do what three or four people would be required to accomplish.

Because this had been an issue for a couple of years, she simply got caught into a rut of doing all that she could every day but realized it would never be enough so she "worked at it" every day as well as she could.

The employee wasn't a manager and shouldn't be expected to manage all the company's department manager expectations. Her boss should have been doing that; the problem with this former CIO worked in a remote office and wasn't paying attention to the needs of the business.

The lesson here is that you need to be careful about what others say about one of your new employees. It may be right on target or it may be misunderstood.

When the responsibility was adjusted to match the capability, this employee flourished and users responded accordingly plus the CEO made it a point to mention the "turnaround in attitude" several times.

It would have been very easy to fire her early on but the additional due diligence paid off for us all.

The "value" of delegating

One of the most difficult things I had to learn was to "let go" and give the work to someone else to do - to "delegate".

In one of my first IT management roles with a small company the lesson was "clear as a bell". I had just left IBM where I enjoyed the "hands on" work associated with the newer systems and what they could do at the time.

I wanted to make a hit with my new boss, the CEO of our small company so I took it upon myself to develop a series of management reports he and I discussed to improve our turnkey software system we licensed to companies in the US.

It was a late Friday night around midnight when he stopped into the office to pick up his mail after returning from a business trip.

He sees me in the Computer Room so he stops in to say 'Hello'. Initially, I think he was impressed that I was so committed. After asking me what I was working on and hearing my answer, I'll never forget his next words.

"Mike, where are all your people? "

The next week we had more conversation and he helped me understand that as the manager, it's not so important what you personally can do for the company, it is more important as to what you can get your team to do.

A hard lesson for me to learn but very important.

Later, I've learned that it's not just about productivity either. By doing the work myself and taking credit, I was actually setting the wrong example and demoralizing some of my team because they knew they should be doing the work. It's all right to participate, but you give the credit to your team. That was a very valuable lesson that I was fortunate enough to learn early in my management career.

“You can’t wear that vest in the Delta.”

An old friend from my IBM days in the early 80’s found me on the Internet this week and we talked for the first time in almost 20 years. It’s sad how you lose touch of people over time and I’m so grateful Larry Alexander “reunited” us.

Our conversation reminded me of a story I learned from one of the senior Marketing Reps in our IBM office. It was customary for a senior person to take a “rookie” (that was me) with him or her to make sales calls or to visit a client during a system installation to help develop our client service skills and to watch a “pro” in action.

I’m all pumped up about going with our senior most Sales Rep, Cliff, to his territory for a few days and watch him in action. Cliff was one of the top Sales Reps in our branch office every year. He knows how to sell !

In those days, most people in urban areas wore three-piece suits with a vest. I had my best pinstripe with my vest on waiting for Cliff by his car. When he comes out, he stops, looks me over and says, “Take that vest off; you can’t wear it into my territory.”

I thought he was kidding but he was serious as could be. The point to his “counseling” was that when you are visiting clients on their “turf”, you need to blend in. Blending in eliminates or reduces potential objections or concerns and when you are selling, you eliminate anything that might get in your way.

That’s why IBMers always wore white shirts; not because there was an edict as much as there was a culture with a mindset that the “white shirt” added very little objection to the sales call.

Don’t forget to tell the 3rd shift operator

Security issues come in all sizes and shapes. When I was a young IBM Systems Engineer, I was involved in a project to install a large Payroll system for a hospital.

As it would happen, the CIO was apparently in hot water with the new Administrator of the hospital. During the time I was “camped out” day and night working on the Payroll installation, the CIO was apparently fired.

Word came down from management of the hospital that the CIO was barred from the Data Center and that the locks and security codes were being changed right away. This is a fairly common approach when management wants to “lock down” the computer room and systems if they suspect the possibility of sabotage by an outgoing employee.

The next day, we were asked to review the computer logs. To everyone’s surprise, the CIO had logged onto the system at 1:15am in the morning.

The locks had been changed, he no longer had any keys, the security codes were changed but he still managed to tap into the systems back in the day when remote access to systems didn’t exist.

How did he do it?

Hospital management told everyone about the CIO leaving the company except for the 3rd shift Computer Operator. When the former CIO buzzed in, the Operator let him into the Computer Room just like he normally would do. Looked like ‘business as usual’ to him.

Fortunately, the former CIO wasn’t there to do anything other than to retrieve a few personal files and to follow-up on a technical issue that he knew about. He was actually very conscientious in his “night maneuvers”.

The morale of the story is that when you think you have all the doors locked, check again to be sure.

A “silver dollar’s” worth

In a company reorganization many years ago, I was about to assume responsibility for a small IT organization and was concerned about how to get started “on the right foot” with my new staff.

You see, I was coming into a regional operations office from the “corporate office” in a time that being from corporate wasn’t necessarily a good thing for those that worked in the “region”.

I was introduced by our senior manager on a Monday and rather than spending time that day I called a meeting with just my new staff for the next morning. I wanted “private time” with them to begin our new manager/staff relationship as soon as possible.

That night, I kept thinking over and over about ways to “break the ice” and to start building the bond my team and I would need to succeed.

Finally, I had the answer.

I prepared the agenda for the meeting just as I had done many times before with other organizations. There was information about the company, our organization’s mission and how it tied to the company’s goals, client issues, and key points that I wanted the staff to hear.

But before I started, I had to “get their attention” !

When they all got seated into our classroom table setting, I walked down the line of tables and dropped a silver dollar in front of each employee. Silver dollars make a definite sound that gets your attention, and I could hear a few faint whispers in the background so I knew it was working.

The message
After dropping a silver dollar in front of all 23 staff members, I went to the front of the room and made my opening pitch:

“These are special dollars I just placed in front of you. You can use them for many things, , , determine who serves first or who tees off first, , , look at them as art, , , use them as a paperweight, , , or buy yourself a soda.

They are special because I won them during an IT seminar in Las Vegas a few months ago, , ,so they are “lucky dollars”.

What they really represent is a gift from me to you as your new manager. If you ever need to speak with me about an important issue, drop this on my desk and we will make it happen immediately because the most important thing I can do as your manager is to support you in your efforts to help our company.”

Some might say I bribed my new team. I would say that it got their attention and helped me “break the ice” so they could see very quickly that I was interested in their success and that our successes helped the company be successful. It cost me $23.00 and remains a positive topic of conversation among those that were part of that special organization.

The benefits far exceeded the cost.

This story had such impact that I repeat the story by handing out a silver dollar in every IT Manager Development Institute.

Toughest User Group Meeting I ever hosted

I joined a small company that was on the verge of a significant growth opportunity. Our mission was clear and as the new CIO it became my responsibility to see that our IT organization was ready for the task to come.

The challenge was that IT had a negative reputation at the time within the company. However, the 43 TurnKey clients we supported loved us.

Oh yeah, one other note. Revenue contribution for the company was 94% from our internal Operations and 6% from the TurnKey clients. Our growth was expected to be in the area of internal operations growth, not selling new TurnKey systems.

I'm certainly not a rocket scientist but I understood the company's need in this environment within a week of being with the company.

After spending time to assess the situation, quantify the issues we had, and to develop my action plans it was time to decide what we wanted to do with our TurnKey business. We liked the additional revenue and didn't want to lose it but we also had a mission to take care of.

I scheduled a User Group meeting at Disney World and planned for the task at hand.

At the meeting, I congratulated the Users on their successes and how much we had appreciated our past relationship. When I got to the point that we were going to get out of the TurnKey business, you could hear a pin drop. There were tears, there was anger, and even disbelief. It was a very hard message to deliver and probably harder to receive.

It helped in that we delivered a well thought out transition plan to minimize disruption in their business and gave them a year to make the transition.

The President of the group was very helpful because I reached out to him and asked for his insight when planning the announcement. He understood the change in direction our company was taking and understood why. He is still a close friend and still uses the same system he was using then.

The morale of the story is:

1. You have to step up to do the right thing.
2. Things may appear bleak at first, but they usually have a way of working out for the best.
3. When you put people in a corner, be sure to provide a path out of it.

Focus on "core competency" to succeed

I joined a small company one time that had two operating divisions. What was interesting about this was the fact that the main focus of the business was in the larger division making up over 90% of the company's revenue.

The smaller division had significant challenges including management focus (or lack of) and needed lots of attention to turn it around.

The other challenge this division had was that it was a very capital intense organization due to equipment requirements to provide specific services that made it somewhat unique.

As an executive team, we liked the fact that the smaller division provided unique services that at some point would become very complimentary services to our core business in the much larger division.

The challenge: Lots of opportunity but where do you focus your limited resources?

In my IT assessment, it was also clear that the technology needed to be updated, especially the business applications which had become obsolete as the small division grew.

We had limited resources, especially cash and capital to fuel the growth of our company.

Likewise, we had limited management resources and both divisions of the company were under stress from poor management of the past.

I knew we could turn the small division around if we were able to focus dollars and experienced management attention to it. The problem was that the small division didn't have qualified leadership to turn around a problematic situation.

My recommendation was that we sell the small division and focus our full energy in establishing a firm foundation for what we believed to be our core business and what made up the bulk of our revenue.

After much deliberation, that's exactly what we did.

We could have made the decision to repair both divisions but it would have taken longer and placed tremendous strain on our weak capital position.

It's important to take a realistic view of what your organization, or company can do. I know for certain that several of our managers could have turned the small division around. The question is at what price do we have to pay to do it.

It was a clear decision for me and why I made such a strong recommendation to focus our limited resources on what was going to be most important for the future of the company.

Early on it was not a popular recommendation and a difficult decision, but over time it became clear it was what was best for our company's future.

Letters from the field

I receive lots of messages and questions from IT Managers from around the world. This section includes a few of the more noteworthy comments and issues that I've written about.

How do you organize yourself?

I have tried to use a PDA but just didn't like it as much as the pocket calendar that I've used since my IBM days in the early 80's. In it, I keep a calendar organized by month, my printed contact list from Sidekick, and blank pages for notes. It's very small, light, and easy.

The calendar is used to schedule appointments and I also have a technique to track travel miles for tax purposes. I update my address list about twice a year and print it out in alphabetical order. Between printouts, I add new addresses to blank pages in the calendar for retrieval as needed and update Sidekick from these notations and the business cards that were collected during that timeframe.

It comes down to a matter of preference on how you like to manage your calendar and addresses. For me, retrieval is almost instantaneous using the old fashioned paper system, and it's one that has worked well for me for 25 years. If I were out working with new people every day, I would probably use a PDA that syncs up the data with my PC but my business model doesn't require high levels of new contact activity.

For tasks, I carry a small journal notebook that I keep a log of notes, follow-up items, and reminders. I create a weekly to-do list every weekend. New tasks are added during the week as necessary. I also use the journal to log notes from meetings, phone calls, ideas that occur, etc. Projects that require more detail are kept in individual project file folders for alphabetical filing and easy retrieval.

Keeping yourself organized is a discipline that you have to develop a process for that works for you. Determine what's important to track and organize and use the tools that work for your lifestyle.

For me, I like simplicity and lightweight items that are easy to carry with me. If I can go to a meeting with just my calendar in hand, all the better. The key is that you have a system that allows you to retrieve contact information when you need it and that you can make notes for follow-up so your clients and business associates can depend on you.

Whatever your choice of tools, you really can't go wrong when organizing yourself.

How do we overcome a poor IT reputation?

"Rome was not conquered in a day.", they say. To turn a poor situation around takes focus, commitment, hard work, and time. If you have a bad situation, it didn't get into this state of affairs over night. Neither will it be fixed over night.

Start by identifying the key problems that's leading to client satisfaction. I use the word 'client' for both internal employees that use technology as well as external clients that pay you for services.

Once you know what your root problems are, determine what it takes to fix them. It may be organizational focus, possibly managing expectations better, or even eliminating some things that you are trying to do because it's either not that important or the IT organization isn't up to the task.

It is always key that you manage the delivery of your services to match up with both your capabilities as well as capacity. Signing up for something when you don't have one of those two elements is pure suicide so if you have such a situation, get it fixed promptly.

Unlike what you may feel, your clients really do want you to succeed. They will always push you for more, and you can either sign up for too much and fail or sign up for an appropriate level of service, deliver consistently, and succeed, , , every time!!

Keys to improving your client satisfaction levels:

- Back off of unrealistic commitments and re-establish what you can do.
- Organize your deliverables in small chunks that you know you can deliver.
- Always quantify what you can do and can't.
- Build some buffer into your commitments (surprises do happen in the IT world so plan for them).
- Coach your staff to over communicate:
    - Be aggressive in follow-up and calling back.
    - Strive to never leave the client in the dark.
    - Don't commit to deadlines unless you can deliver and
    - If you commit, you had better make it happen.

Clients want results and need you to do what you say you will, and consistently. Most clients are more forgiving than you may think but lose their confidence and it's all over. Do these things with a positive mindset and you will improve your situation.

"We have a new CIO who wants cost justification for all existing projects. Why ?"

I've been that new CIO before and I've done exactly the same thing - asked for the cost justification of all existing projects as well as planned projects. The reasoning is pretty simple:

1. Is there a cost justification?
2. Does the project fit within the company's strategy?
3. Does the project have the appropriate priority?

I've seen IT organizations work very hard and spend thousands of dollars on projects that provide no value to the company. It's not that uncommon actually because a real problem exists when "technicians" develop IT strategies without doing their homework to ensure their initiatives are in sync with company needs.

Your new CIO's main obligation is to the company that hired him. His first priority has to be to assess the company's needs and to inspect every project that spends money or uses technology resources to determine if the IT organization is working on the "right" priorities.

Jump in and help him size it up quickly. It's not a personal issue so don't be too attached to your project even if you are almost done. For example, if you are working on a systems conversion for a subsidiary of the company and the parent company intends to sell that subsidiary, you are wasting time and valuable resources. Even if you are 60% complete, it may be the best solution to cancel the project for the company's best interest.

"Is age discrimination an issue for IT Managers and Project Managers?"

If you had asked me this a few years ago, I would have said, "definitely". The dot.com boom and the buzz about reengineering the corporation seemed to make senior executives believe that younger, entrepreneurial managers could make all their problems go away quickly and many times easily.

You know what, there really aren't too many shortcuts unless you have a business that is running so poorly and needs basic processes to operate effectively.

All companies have challenges and always will. I have seen a few companies take the lead of a "smooth talker" thinking that his/her ideas were innovative and that the company could take a major leap forward quickly by casting away all the "old ideas" that had been successful to that point but "slower than what should be". We have all seen companies take this leap of faith and watch their stock price go from $50.00 per share to $2.00, or even lower.

Since the dot.com blowout and the depressed economy, I would say that there is truly a renewed focus on company earnings. In many cases, companies are looking for the veteran CIO or Project Manager that has solid credentials in managing IT initiatives cost effectively and has a proven record of achieving tangible results. It's now in fashion to have a credible track record and the "t-shirt" that says you have "been there and done that".

I wouldn't say there is still not some prejudice against older managers but there is definitely more situations where a little gray hair is a benefit and not a liability.

The thing companies look for and need is someone that instills quick confidence and that they believe can come in and make a difference quickly. The better you are in articulating your capabilities and achievements that show you know how to align technology initiatives with business needs that are cost effective, the better your chances.

The real prejudice against an older manager is often that he or she normally costs more. That's a legitimate concern. A solid manager, regardless of age, can be worth their weight in gold and in most cases you get what you pay for.

"How do you pay the salaries required to keep your best people?"

The short answer is, "I don't." The misconception is that money is the primary driver for employee satisfaction and it truly is not. If it were you would see much more turnover than occurs in the technology world today.

Every study you will find lists money well down the priority list of issues that are important for employees to remain with their company. This doesn't mean that compensation is not important. Certainly, your compensation packages need to be competitive in the local and regional market you are in. But competitive doesn't mean "over paid".

Motivating an IT staff is somewhat an art in that "how you go about" your actions can be just as important as "what you do". Employees pick up on sincerity (or insincere actions) very quickly. Try to introduce a motivational action and not be sincere about it and it can make things worse.

Key things employees want from their manager and their company and what motivates them to work hard and stay with you include:

- **Training and education -** Technical employees have a big need to keep learning and to stay current.
- **A challenge -** Motivated employees are busy and want to feel challenged.
- **Seeing accomplishment -** Everyone needs to have successes. The more you can show the results of the work and how important it means to the company the more you have your staff wanting to do more.
- **Confidence in their manager and company -** People want to run with winners, both Managers and companies.
- **Feeling trusted -** Empower them to do their job and give the flexibility, tools, and support to get it done and watch the results. It might amaze you.

"Will you share an effective staff meeting agenda?"

The first thing to do is to put yourself in your employee's shoes and think about what you would want to hear if you were in their place.

Most of us have similar needs in that we all want: to know:

- what's happening in the company
- are we succeeding
- things that help us get ahead
- "what's in it for me"

I structure staff meetings to do several things:

- Keep employees informed.
- Keep employees feeling part of the team and the company.
- Coach the team on important issues.
- Share successes as well as failures. (I always give the credit for successes to the team and I always take the hit for failures in a group meeting.
- Reward successes, both achievement of initiatives as well as behavioral successes.
- I try to call every team members name at least once in every meeting. (Speaking about a first line management role, not that of a CIO with possibly hundreds of employees.)
- Train employees on new concepts.

My agendas usually follow the following format:

- Company news
- IT Department update
- Key initiatives status and month's focus
- Training topic
- Manager perspective (I use this section to coach and to reward accomplishments.)
- Question and answer session

A staff meeting can be a great tool to help you coach and mentor your team. It is one of the ways to keep an open line of communication. Your approach needs to be open and honest and worth people's time; otherwise, you will lose ground with the team, not develop the strong bond you're wanting to achieve.

Another tactic I use is to assign two people to host the meeting every month and rotate this assignment. This gives team members additional responsibility and some flexibility as to what can be part of the agenda. You should always be the one to approve the agenda so you aren't totally surprised. People can be overly creative at times.

Meetings are very valuable when they work toward helping members of the team and reinforce teamwork.

"What to do when staff is bombarded with last minute requests?"

When I hear this type of issue exists, there are four things I want to understand:

- What are the requests?
- Why are the requests being asked for at the “last minute”?
- Who is asking for help?
- What’s causing these issues?

If you know the answers to these four questions, you should be able to develop a strategy to reduce or eliminate the issue altogether. Worst case is that you should be able to develop a process by which to avoid the need for “last minute” cries for help.

In many cases, Help Desk logs and incident trends should be able to help you identify the answers to the first three questions. The last question takes a bit of analysis but when you have the data to support the first three questions it usually points to “what’s causing the issue”.

The answer to this dilemma usually falls into one or more categories including:

- quality
- capacity
- managing expectations
- responsiveness

Once you know what, why, who, and cause, then the rest is up to you as the manager to initiate improvements or conduct coaching sessions that improve the situation.

There is always a logical reason as to why “last minute” calls are coming in. Figure out the four questions above and you will get to the solution to reduce or eliminate the problem.

“What books do you recommend?”

When asked this question, I had to ponder a bit. The answer obviously depends upon the context of the question and in this case it has to do with books that provide sound management advice.

The list below includes a few publications, some that have been around quite a while. They are a diverse set of titles that I have found to be informative and helpful.

- ***The Goal: A Process of Ongoing Improvement*** by Eliyahu. M. Goldratt (discusses the importance of identifying and eliminating bottlenecks).
- ***Executive Essentials*** by Mitchel Posner is a book that I have had for many years and still reference some of the material on occasion.
- ***Lincoln on Leadership*** by Donald T. Philips
- Two short books by John Maxwell:
  - ***Teamwork Manes the Dream Work***
  - ***The Right to Lead***
- Tom Mochal, a widely published Senior Project Manager is about to release his first Project Management book this month. The title is, ***Project Management Essentials: 50 Lessons from a Project Management Coach***. Look for it on his web site at www.tenstep.com . Tom takes a unique approach by discussing 50 issues Project Managers face in a story line and develops the thought processes and solutions to the issue with seemingly "real people".
- ***Good to Great: Why some companies make the leap,,, and others don’t*** by Jim Collins is a recent best seller and well worth reading.
- One of my books is available in paperback and is also sold on Amazon.com. The title is ***IT Management-101: Fundamentals to Achieve More***. I recommend this to IT Managers of any level. It's a quick read and includes discussion of eleven traits that I have seen that are key to being an effective IT Manager.
- ***The First Book of Common Sense Management*** by Diane Tracy is a short read that has some very good points.
- ***You Can't Lose if the Customer Wins*** by Ronald A. Nykiel (the title says it all).
- ***Taking Charge*** by Byrd Baggett includes over 200 quick snippets of basic principles for effective leadership.

“How do you prioritize your work with so many things needing to get done every day?”

Wow, that’s a good one. It’s also a very challenging issue. In today’s environment, issues are flying at you all the time and coming from all directions. As an IT Manager, many of these issues are things that happen that are beyond your control. Just ask the people on the US east coast about their challenges this week with Hurricane Isabel.

Here is what I try to do.

I **categorize issues, projects, open items, etc. into one of three categories**. Call them “A, B, or C”, “High, Medium, Low”, or “Critical, Needed, Nice to have” or anything that makes sense for you.

I try to **list all of the open issues I have every week** and I **reprioritize them into High, Medium, or Low** (or the other descriptions we mentioned).

High items must be critical and absolutely required to complete soon.

Medium items are needed but are not necessarily critical.

Low items are good to have but don’t have the level of importance as the other two groups.

From the list of High items, I prioritize each of the issues from top to bottom. In other words, I number them from #1, #2, etc until all are sequenced in rank of importance as I see them.

I **target the highest priority in the list** to get it done or at least to the point required before working on something else. Be aware, however, that you normally have several balls in the air at one time. That’s ok as long as you are getting some things completed and off your plate.

I **review all the items in all category groups** to determine if they are where they need to be. If there are things that help my productivity by placing a lesser important item ahead of others so I can do more, I do so.

Sometimes, I might throw an easy project to the front of the list simply because I need to see some accomplishment taking place. Nothing motivates you more than to see results.

Make a **habit of knocking off two or three items from your list every day** and you will make big strides. The difference here is that you are being much more proactive and taking conscious steps in focusing on important issues you have quantified. Believe me, others will see the results.

"How much should I be spending in IT ?"

I get this question quite a bit.

Measuring IT expense as a percentage of revenue is a key measurement I want to evaluate what it is costing the company for technology support.

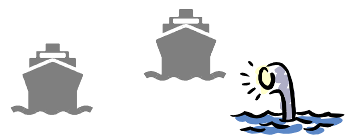
I have looked for industry standards but haven't found any that I thought were reliable, , , and there is often a real problem with so called standards anyway.

Here's why. You can take two almost identical companies in the same industry with roughly the same revenue base, similar number of clients, etc., and the cost to support their technology may be vastly different for appropriate reasons.

If one company is highly automated with a single primary business application while the second company has very little automation and multiple technologies due to recent acquisitions, the needs are totally different.

Even when on the surface they look so similar in all aspects.

On the surface, both have similar characteristics (revenue, # of clients, same industry and mission, etc.).



Closer inspection shows that the two companies are so different that from a technology needs standpoint, they barely resemble one another.

The automated company may be spending half as much as a percent of revenue as the other company and they could both be spending at an appropriate level.

The real issue boils down to spending at a level that is appropriate for the business at any given time based upon the circumstances and what you are trying to do.

That's why I place so much emphasis on conducting a thorough IT assessment. It is the key piece that tells you all you need to know in order to make a positive impact for your company in your IT Manager role.

If you are interested in learning how to conduct an effective IT assessment, take a look at IT Due Diligence. It contains a complete process and tools that walk you through it.

IT Management Models

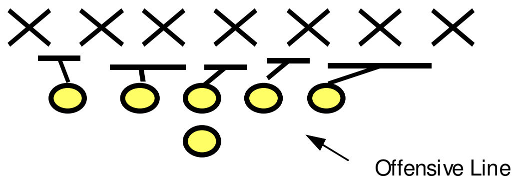
Pictures are worth a thousand words. That's the principal with my IT Management Models. Every model includes a picture that helps you remember the model along with key management points related to the model.

An entire book with over 50 IT Management Models is planned and available soon.

Play your position

With the Super Bowl played this past weekend, it reminded me of a model that I've used hundreds of times in coaching others on my team through the years.

It begins with understanding the basics of football and playing your position. In an offensive line (shown as the "O's" in the graphic below), the primary mission is to block defensive players and to protect the quarterback.



Each lineman has a designated area to block. When one player fails to execute as planned, the team bogs down and forward progress is more difficult. Every player has to play his position and count on his teammates to execute their assignments successfully.

This example works the same for an IT organization. I've seen too many IT organizations perform ineffectively because they either:

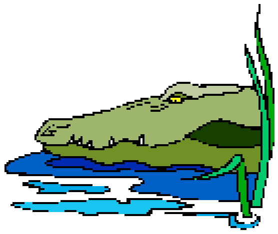
- lack focus due to a lack of specific responsibility
  - team members lack the skill to succeed
  - team members wander away from their assignment to help another area

Focus is key. Mis-assignments of responsibility or lining up your players without the skills to be successful is a management issue. Once proper responsibilities are established and communicated, it is the team member's responsibility to execute in a manner that supports the team's overall efforts.

Key management points:

- Assign every team member specific responsibility
- Take advantage of strengths and "shore up" your weaknesses
- Provide the tools that allow each person to be successful
- Expect each team member to succeed individually and to support the team
- Build your strategy around your team's capabilities

Drain the swamp



Too many IT organizations run by the "seat of their" pants" and are reactive in nature. I'm sure you've seen it, even heard people express symptoms of the problem like,

"We are too busy & don't have time to plan."
"We have too much work to do."
"Projects aren't finished on time because of constant interruptions and surprises."

Every manager has the opportunity to establish an environment that is predictable and that clients can rely on. For some, however, getting there is a very long step to take.

One of the reasons many managers find themselves in an environment that is constantly full of surprises and reactive is that they are so busy fighting alligators (dealing with problems) that they forget to "drain the swamp".

The point is that every organizational situation has key issues that need to be addressed to turn it from a reactive environment to one that is more predictable. You have to identify your key problems (i.e., the alligators) and determine how to eliminate them. No swamp, no alligators to fight.

Key points to the model:

- Define your mission & plan your initiatives
- <u>Dedicate</u> resources to primary objectives
- Eliminate the source of problems vs. spending resources on fixing problems

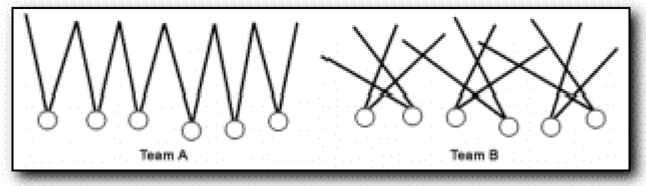
Drain the swamp is a key model every IT manager needs to pay attention to. Lack of clear objectives and failure to maintain focus causes more productivity loss than anything I know of.

Lines of fire

One of the management models I've used plenty comes from my days in the Marine Corps. It has significant application to managing an IT organization and maintaining your staff member's focus.

In the graphic below, you see two sets of Marine riflemen positioned with their range of fire set for them. One of these teams is by far more effective in a real "fire fight".

Can you guess which one and why?



At first glance it looks like the left group has a very organized and efficient approach that covers the whole field. It actually does until one Marine stops to reload or gets taken out of action. Then, there is a gap that can destroy the entire team.

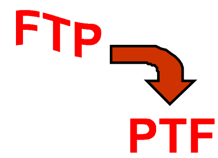
On the other hand, the group to the right looks like they are all over the place. The fact is that this setup has much more field coverage because of the overlap in one another's fire lanes. When one Marine reloads or goes out, there continues to be more of the field covered by the other five Marine's fire lanes.

Managing an IT staff is similar. I've seen too many organizations operate inefficiently because people are running all over the place trying to react to today's latest crisis. When I encounter such a group, one of the first things I do after assessing the needs of the business is to establish a "field of fire" or specific responsibility area for each individual.

When you have staff jumping through hoops to take care of business, it's a good sign in that it shows that they care. Once you get them focused with specific areas of responsibility, coach them so they stay in their position and take care of "their job" and count on the rest of the team to take care of theirs.

We wish the men and women of the Armed services God speed during these difficult times.

Fail to Plan : Plan to Fail



Believe it or not, more IT managers fail to plan because it's hard work and much easier to react to issues rather than develop a concise plan of attack.

Executing well and being aligned with your business has a lot to do with how well you plan. Planning is the most significant part of high levels of achievement.

Planning literally puts you in the "driver's seat". It establishes clear expectations of what you will do, when and how. Planning also send the message to others around you that you are organized, decisive, and willing to make the effort to get the job done properly with minimal surprise and problems.

Many fail to plan because it is easier to "wing it". When you "shoot from the hip", surprise, problems, and ultimately failure are right around the corner. It's just a matter of time.

None of us are good enough
to successfully execute
projects and technology initiatives
without a solid plan.

Can you imagine a construction company putting up a building without a plan? Or how about a heart surgeon replacing a heart valve without planning the operation thoroughly, , , down to having contingency procedures in place in case the operation doesn't go well?

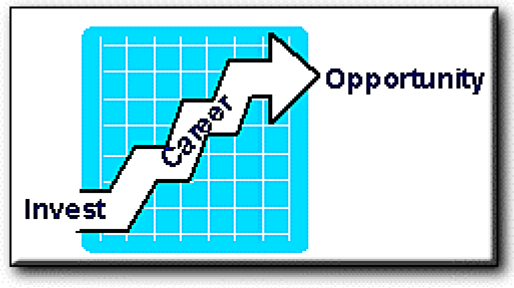
Managing an IT organization certainly isn't heart surgery but the outcome of proper planning is just as predictable in the IT world as in surgery or building construction.

Key thoughts about planning:
- Planning helps you anticipate major issues
- Planning organizes your team for success
- Planning is a leadership quality
- Planning will enhance your career
- Planning develops your management insight
- Planning helps you create predictable results
- Planning is a requirement and not a "nice to have"

A key success factor for any IT Manager is the ability to plan for the future.

Most don't !

Invest in yourself



Managers need to constantly learn and improve just like all the rest. Big things can happen when you learn new concepts and techniques that improve your performance.

Some of the best lessons I have learned have been insights gained from watching and observing others. I have also gained a considerable amount of skill by attending formal classes. One of the quickest ways to improve your skill set is to get the "abridged" or condensed version from those that have walked in the shoes you are walking in now.

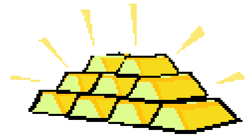
The first time down any path can be confusing, vague, difficult, and especially challenging. How many times have you listened to someone explain an issue to you and the "light goes on"? There are all types of educational resources available to you if you take advantage of them.

Invest in yourself each year and you will see that the results of your efforts improve considerably over time.

And don't underestimate the value of having a solid mentor. Having access to a good coach can save you considerable time and frustration on any number of topics and situations. They are literally worth their weight in gold due to the differences they can make in your productivity and effectiveness simply because they have already traveled the path you are seeing for the first time.

Take the knowledgeable path with a mentor; you will have fewer bruises.

A good mentor is worth his weight in gold.



Prevent fires

IT organizations have to be able to “fight fires” when they occur, , and they eventually will happen to us all.

Your company is better served when you prevent the “fire” from happening in the first place.

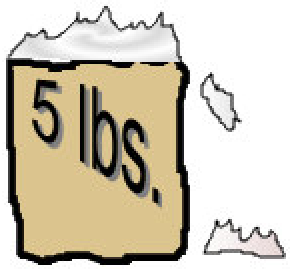
Organize to be able to put out the fires when they occur but spend the majority amount of your focus and effort in developing the organization and processes that prevents breakage.

You can’t prevent the flood or tornado but you can certainly put procedures in place that deal with a tragedy situation.

Little things go a long way. Implement a quality assurance program in your software delivery and notice a big difference in your user acceptance and what it does for improving client service. The programmer may feel that it slows the work down and reduces output but in the long run eliminating breakage (preventing a fire) improves your programming staff’s productivity.

- Preventing problems is by far more powerful than solving them after the fact
- Be prepared to fight the fire but spend more time in prevention
- Preventing problems should be a cultural mindset in the IT organization

5 pounds of sugar for a 5 pound sack



IT resources have capacity constraints just like a 5-lb. Sack has a limit to how much sugar it can carry.

You may get extra ounces of sugar in the 5-lb. Sack by stacking sugar up above the top rim of the sack, but eventually it spills over.

All IT resources, staff, systems, networks, etc. have limits. One of the keys to managing IT resources effectively is understanding the limitations and being able to manage expectations to the limits that exist.

Let’s look at an example using a programming team. Each programmer has a certain capacity for effectively producing code to make software changes, new additions, etc. In order to establish my “programming capacity”, I assign an average of 100 hours per month that each programmer can effectively complete. Although there are 160 hours in a month, the effective capacity is less than that due to vacation, meetings, training time, etc. Over the years, I have found that 100 to 120 hours per month works out about right.

Once I establish my capacity, I can look at the programming backlog. If the requests are estimated for number of programming hours needed to complete the request, I can more easily manage expectations of how much I can complete each month.

Ultimately, I don’t care what we work on assuming the department managers and clients are establishing appropriate priorities. How we use the “5 pound sack” of programming capacity is not as relevant as ensuring we all understand that we have 5 pounds of capacity to apply to the needs of all that need programming support.

Ready-Aim-Fire

Sounds as easy as 1-2-3 doesn't it ?
Logical as can be - right ?
It's how we all manage, isn't it ?

Not quite.

There are quite a few management styles. You can probably put these tags on a few managers you know:

Ready-ready-ready-aim-fire - The manager that can't seem to make a decision.

Fire-Ready-Aim
The manager that shoots first and asks questions later.

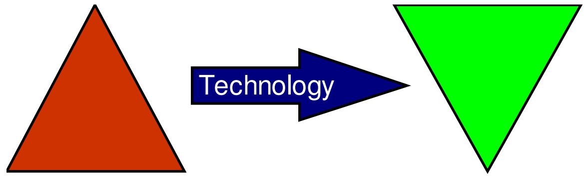
The Ready-Aim-Fire manager identifies the specific target he needs to hit (develops a strategy), prepares to hit that target by taking careful aim (plans and prepares), and fires with accuracy (implements).

This management style is much more effective, "breaks less glass", and invariably has a much more productive organization than other managers that don't take the time to plan or can't make a decision.

In a real "fire fight", you have to react quickly and without hesitation. However, preparing yourself for the "fire fight" by assessing your situation, identifying key issues, and developing a plan to address risks and opportunities can help you be a much more effective manager.

Technology - a facilitator of paradigm shifts

IT managers have an ability to create huge amounts of change for the good of your company. So much so that technology can literally create a paradigm shift for a company or an entire industry,



Want to see the impact technology can have on an entire industry and literally turn it upside down?

Two examples:

1. **Airline industry** - When American Airlines made its proprietary passenger scheduling software called SABRE, it spun off a whole new industry and put power into the hands of the consumer.

   How?

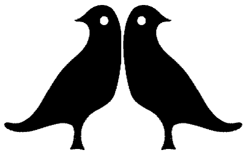
   Companies like Expedia.com and Travel.com now give us all access to the best price options for virtually any trip we want to make and from all commercial airlines. And it provides access to the information easy and anonymously. This action created a whole new level of airline competition because now the consumer can look at all possible options and make informed decisions.

2. **Grocery industry** - Before scanning, vendors told grocery stores where they wanted to place their items and how much they would charge to put their items in the store.

   Scanning turned this scenario upside down. Once items were scanned and groceries had solid sales statistics, the grocery industry began telling vendors where they could put their product and how much they would take, sometimes even charging for prime shelf space.

Technology has the ability when appropriately focused to turn situations upside down and to totally shift the norm. Use technology wisely.

2 birds with 1 shot



There are many situations where "hitting 2 birds with 1 stone" can make a big difference in IT.

Here are just a few for you to think about:

1. When hiring, it's nice to be able to hire someone that meets multiple needs in your organization. Finding someone that addresses several skill needs of the organization is a plus and well worth the effort to find.
2. When programming requests are prioritized, it improves productivity when you can knock off several request changes in the same project when the requests affect the same program.
3. Technology initiatives that can address multiple needs of the company are great ways to enhance IT's reputation. Doing things that provide value and improve client service are big winners for the client and for IT.

Key points to consider:

- Always look for leverage opportunities
- Incremental expense or effort can have big return
- Involve your staff in identifying "two bird" possibilities
- Measure the improved gains
- Create awareness of successes

Final thought:

Anything you do that leverages your IT Organization's productivity is a benefit for all concerned. Take a proactive approach in seeking out situations that allow you to address multiple issues with one focused effort.

Technical Tips

Webmaster tools that I found useful are included in the articles I wrote about this topic. No longer a topic in the Practical Technology Tips Newsletter, these little tidbits will give you insight into some things you can do with your web site and how easy it really is.

Put your Microsoft Word, Excel, or PowerPoint on the Internet for others to access.

Have you ever had a situation where you needed to make a list of information, a sample proposal or other document available to people outside of your company but you don't always know who will need to look at the information. With e-mail, you can send the file to the party that needs it. But, if you aren't sure who will need to access it and when, what do you do ?

A possible solution might be to have your webmaster upload the EXCEL spreadsheet or WORD document to the internet so you can provide those that need to take a look at it can retrieve the file from the internet. When they access the file, it automatically loads the proper software (EXCEL, WORD, or POWERPOINT on their system through their internet browser and loads the file. They can then work with the file on their desktop just as they normally would. This process assumes that the person accessing the file has the required software loaded onto their PC.

Try it. Go to my internet site and retrieve a WORD document at the following address:
www.mde.net/sample/sample.doc

or retrieve an EXCEL file to see how that works at this address:
www.mde.net/sample/sample.xls

(You must have Microsoft WORD '97 or EXCEL '97 software or later on your PC.)

In both cases, there is simply a file created by WORD or EXCEL that has been uploaded into my disk space area accessible by the Internet. Once uploaded, it is available to anyone that knows the address.

Need security ?

Before saving your WORD or EXCEL file, place security restrictions on them.

In WORD, you do that by:
1. Select TOOLS
2. Select OPTIONS
3. Select SAVE
4. In the SAVE Window, fill in a "Password to Open" or "Password to Modify" as needed.
5. Save and name the file
6. Upload the file to the appropriate file folder on the internet (see your webmaster)

In EXCEL, you do that by:
1. Select TOOLS
2. Select PROTECTION
3. Select WORKSHEET
4. Key in a password
5. Save and name the file
6. Upload the file to the appropriate file folder on the internet (see your webmaster)

Don't forget your password !

Search Engine Submitter

What's a web site worth if no one can find it ? The answer is simple, not worth very much other than you might like it because it looks nice. The first rule of getting discovered is to insure that your site can be found by the search engines such as Lycos, Infoseek, SearchIt, Excite, AltaVista, and many, many more.

A few months ago I was talking to a friend of mine and he was telling me how laborious it was to hand register a web site with all the search engines. What has been a simple thing for me to do for a long time became apparent that many don't realize that there are "search engine submitters" that do the work for you while you drink coffee in the morning.

I use a couple of 'registration submitters'. Both are reliable and submit to over 40 Search Engines, more than 100 Directories, and thousands of Free For All's (FFA's). Be sure to read the information on each so that you're submitting (registering) your web site to the group(s) that you want. Also, FFA's generate tons of e-mail so you may want to prepare yourself if you choose to submit to this category.

Before you submit to anything, be sure to include the appropriate keyword meta tags in your website code. If you don't understand meta tags, you should probably stop here until you do. It may be a good topic for a future edition. Meta tags are lines of code within your web page html code that list the key words by which searches can find your site. Without them, you won't get too far.

The two registration submitters that I use are at:

- www.jimtools.com Go to the Search Engine Submitter section and follow instructions.
- www.submitshack.com Follow the directions.

There are many more "search engine submitters" available to you. You may want to research this on your own. You can pick the one that you like best.

One good place to see many of them listed is at www.web-source.net in the "Promotion" section. The other good thing about this is that it takes very little time and it's also free.

There are also services available for a fee that purportedly submit and resubmit often to keep your site in the front of the search engines, directories, and FFA's. I haven't used any of these so I can't really comment on them. For my purposes, the free submissions are getting my web sites visibility.

HTML E-Mail Link with “Subject” Filled In

Most people are aware of the **MAIL-TO** tag in HTML, which allows you to send mail to a particular address by clicking on a link. Adding the subject to it automatically is very easy, you can have the mail automatically come up with the default subject that you select.

A standard mail-to link will look like this:

<A HREF="mailto:mike@mde.net”>

You can give the mail a subject of "Support Request" by changing it slightly to look like this:

<A HREF="mailto:mike@mde.net?subject=Support Request">

HTML "Pop-up" Windows

It's very easy to install those pop-up windows you see when you load a web page or when you exit a site. They can be powerful marketing devices to get your message across.

Here's how:

First, place the message you want to see on a separate web page. This message should be the only content on the web page.

Second, copy and paste the following code in between the <body> and </body> tags in the code of the page that you want the pop-up window to appear from. The code below will open the window upon opening the web page; I'll show you how to pop it open at the time you exit the web page later.

```
-start of code-
  <script language="javascript"for="window"
  event="onload()">window.open
  ("http://yourwebpage.com","myannouncer",
  "scrollbars=yes,resizable=yes,height=230,width=380")
  </script>
-end of code-
```

Replace the "yourwebpage.com" with the site that contains the pop-up window information. You can change the size of the window by changing the height or width values. The code above automatically opens the pop-up window when a visitor enters the web site.

To change it to pop-up when they leave the site, simply change the "onload()" to "unload()".

Create a new web browser page versus leaving your site

One of the recommendations of most web design consultants is that when you get a visitor to your site, keep them there. One way we often lose a visitor is when we have a link on our web site that takes them to another web site. An easy way to keep your site session intact is to create a new browser window for the linked site. When they link to the site, a new browser window will automatically display for the "go to" site and your initial web site browser window will be active but in the background. This way, the user will always come back to your site when they delete the new linked pages. It will help your users see your site last and avoid losing them in the Internet maze.

To do this, insert the following code into your web page html code.

```
<A HREF=http://www.somesite.com TARGET="whatever">Check this out</A>
```

On your original web site, you will see a link titled, Check this out. Once clicked on by the user it will open up the web site (http://www.somesite.com) into a brand new window. Change the code of both of these elements to suit your needs. The TARGET="whatever" opens up a new browser window titled "whatever". Browser windows actually have names. If you want to direct another selected link to the same window (so you don't open up dozens of windows), simply use the code in every link to use the TARGET ="whatever".

Auto Fill E-Mail Subject

You can automatically fill in the e-mail subject when your user selects the e-mail link on your web site. Add the following code to your html code:

<A HREF=”*mailto:you@yourdomain.com?subject=Your_Subject”*>

Change the domain and subject content to meet your needs.

In M/S Publisher or other web development tools that give you the ability to create an e-mail hyperlink by simply filling in the e-mail address to the hyperlink selection box, add “**?subject=Your Subject**” without the quotes to the end of the e-mail address you are sending to.

For example, to create the hyperlink in Publisher to send an e-mail to my e-mail address, I would:

- *Highlight the link text or graphic*
- *Select Insert*
- *Select Hyperlink*
- *Select Create a Hyperlink to an E-mail address*
- *Key in: mike@mde.net?subject=Your_Subject*

Change the subject content to meet your needs.

Auto-forward a domain site to another domain

There may be times when you need to use a “ghost” domain site that you want only for the domain name but when clicked on will automatically take the user to another domain where you actually maintain web site content. To do this is simple and straightforward.

On the Index page of the “ghost” site, place the following html code:

```
<META HTTP-EQUIV=”Refresh” CONTENT=”3;URL=http://www.somedomain.com/”>
```

When the “ghost” domain is entered as the url address by the user, it will automatically forward to and open up the home page of the domain *“somedomain.com”*.

Dissolve Your Web Pages “In” and “Out”

Today’s article is about pages which dissolve, box-in and out, or create other eye catching screen transitions when a visitor clicks to enter or leave a web page.

Please note that this only works for Internet Explorer (IE) 4.0 and above.

Add this code to “dissolve in and out of pages”:

<META http-equiv="Page-Enter" content="revealTrans (Transition=1,Duration=1.000)">

This meta tag has the “Page-Enter” attribute which will allow this function to kick on when someone enters that page. The “content=”revealTrans” cues their browser to start the transition. The (Transition=1...) lets the users browser know which transition to display.

Well, how do YOU know what transition to code ?

The transition options that you can use includes:

"Transition=0" will give the "Box in" effect.
"Transition=1" will give the "Box out" effect.
"Transition=2" will give the "Circle in" effect.
"Transition=3" will give the "Circle out" effect.
"Transition=4" will give the "Wipe up" effect.
"Transition=5" will give the "Wipe down" effect.
"Transition=6" will give the "Wipe right" effect.
"Transition=7" will give the "Wipe left" effect.
"Transition=8" will give the "Vertical blinds" effect.
"Transition=9" will give the "Horizontal blinds" effect.
"Transition=10" will give the "Checkerboard across" effect.
"Transition=11" will give the "Checkerboard down" effect.
"Transition=12" will give the "Random dissolve" effect.
"Transition=13" will give the "Split vertical in" effect.
"Transition=14" will give the "Split vertical out" effect.
"Transition=15" will give the "Split horizontal in" effect.
"Transition=16" will give the "Split horizontal out" effect.
"Transition=17" will give the "Strips left down" effect.
"Transition=18" will give the "Strips left up" effect.
"Transition=19" will give the "Strips right down" effect.
"Transition=20" will give the "Strips right up" effect.
"Transition=21" will give the "Random bars horizontal" effect.
"Transition=22" will give the "Random bars vertical" effect.
"Transition=23" will give the "Random" effect.

The “Duration=1.000” tells the browser to take ONE second to show the transition. Keep this number small or you will frustrate your visitor.

It's that simple to put transitions in your website pages.

Linking to a Specific Location on a Web Page

You can create a link that takes you to an exact place within the same page by adding the following codes. I'm sure you've seen this often; you click on a link and it jumps immediately to the paragraph or section the link references.

Step 1:
Select the area of text that you want the link to take you to when clicked on and place this code with any name you'd like. This will create an anchor for your link.

<A NAME="**Anyname**">Anyname</A>

Step 2:
Create your link and make sure you use the same name as you used in your anchor:

<A HREF="#**Anyname**">Click Here</A>

HTML Tag Quick Reference Chart

I use a web development tool to create my web sites and to automatically generate the HTML code that is needed, but I often find the need to insert a piece of HTML code in an ad, an EBAY auction, or within a web page I'm working on to spruce it up. If you find you have the need for a quick HTML reference chart, take a look at the site below. I've found it to be very helpful.

http://www.web-source.net/html_codes_explorer1.htm

I started to create my own html tag reference sheet, but I found a site many months ago that has the most comprehensive list that I've seen with excellent examples and tips on using them. Go to the WebSource site, www.web-source.net, for a nicely organized html tag reference set. Print it out and you always have a handy reference when you need it in an excellent format as shown in Figure 3.

HTML Tag Chart

Tag	Name	Code Example	Browser View
<!--	comment	**<!**--This can be viewed in the HTML part of a document--**>**	Nothing will show (Tip)
<A -	anchor	**<A** HREF="http://www.yourdomain.com/">Visit Our Site**</A>**	Visit Our Site (Tip)
<B>	bold	**<B>**Example**</B>**	**Example**
<BIG>	big (text)	**<BIG>**Example**</BIG>**	Example (Tip)
<BODY>	body of document	**<BODY>**The content of your page**</BODY>**	Contents of your webpage (Tip)
 	line break	The contents of your page** **The contents of your page	The contents of your page The contents of your page
<CENTER>	center	**<CENTER>**This will center your contents**</CENTER>**	This will center your contents
<DD>	definition description	<DL> <DT>Definition Term **<DD>Definition of the term** <DT>Definition Term **<DD>Definition of the term** </DL>	Definition Term **Definition of the term** Definition Term **Definition of the term**

Add the ability for Internet Explorer users to bookmark your web page as one of their Favorites

The code below only works for Microsoft Internet Explorer users but can be a valuable tool to help visitors of your site remember where they found you so they can return easily. Insert the code into your web site's html code and you're all done. It's a piece of cake.

```
<SPAN style='color:red;cursor:hand;'
   onClick='window.external.AddFavorite(location.href, document.title);'>
 <FONT face="Arial, Helvetica" size="2">
   Internet Explorer Users: Click here to add this
      page to your list of favorites
 </FONT>
</SPAN>
```

Take a look at this capability at the bottom of my web page to see how it works. You must have Microsoft Internet

WATERMARK IMAGE REMAINS ON THE SCREEN

Simply insert the below code into the <body> section of your page, immediately following the <body> tag itself. Change the url to reference your own background image.

```
<script language="JavaScript1.2">

if (document.all||document.getElementById)
document.body.style.background="url('http://www.mde.net/images/target.jpeg') white left top no-repeat fixed"

</script>
```

The image will remain fixed in the top left portion of the screen.

Use a "drop down" menu to select a state

To make it easy for your visitor to select a state, use the following code. You can also modify the states to use it for almost any list that you want to select from. The code has New York set up as the default state. Use the code on the New York line for any state that you wish to use as your default to make it easy on most of your visitors.

```
<select name="state_picked">
<option value="">None
<option value="AL">Alabama
<option value="AK">Alaska
<option value="AZ">Arizona
<option value="AR">Arkansas
<option value="CA">California
<option value="CO">Colorado
<option value="CT">Connecticut
<option value="DE">Delaware
<option value="FL">Florida
<option value="GA">Georgia
<option value="HI">Hawaii
<option value="ID">Idaho
<option value="IL">Illinois
<option value="IN">Indiana
<option value="IA">Iowa
<option value="KS">Kansas
<option value="KY">Kentucky
<option value="LA">Louisiana
<option value="ME">Maine
<option value="MD">Maryland
<option value="MA">Massachusetts
<option value="MI">Michigan
<option value="MN">Minnesota
<option value="MS">Mississippi
<option value="MO">Missouri
<option value="MT">Montana
<option value="NE">Nebraska
<option value="NV">Nevada
<option value="NH">New Hampshire
<option value="NJ">New Jersey
<option value="NM">New Mexico
<option value="NY" Selected>New York
<option value="NC">North Carolina
<option value="ND">North Dakota
<option value="OH">Ohio
<option value="OK">Oklahoma
<option value="OR">Oregon
<option value="PA">Pennsylvania
<option value="RI">Rhode Island
<option value="SC">South Carolina
<option value="SD">South Dakota
<option value="TN">Tennessee
<option value="TX">Texas
<option value="UT">Utah
<option value="VT">Vermont
<option value="VA">Virginia
```

```
<option value="WA">Washington
<option value="DC">Washington D.C.
<option value="WV">West Virginia
<option value="WI">Wisconsin
<option value="WY">Wyoming
          </SELECT>
```

Add "today's date" to your web site

Want to add a date in your web page? Take this script and put it in the body of your html code where you want the date to appear.

```
<SCRIPT LANGUAGE="JavaScript">
<!-- Begin
myvar = new Date();
Month = (myvar.getMonth() + 1)
Year = (myvar.getYear())
if (Month == 1) {WordMonth = "Jan";}
if (Month == 2) {WordMonth = "Feb";}
if (Month == 3) {WordMonth = "March";}
if (Month == 4) {WordMonth = "April";}
if (Month == 5) {WordMonth = "May";}
if (Month == 6) {WordMonth = "June";}
if (Month == 7) {WordMonth = "July";}
if (Month == 8) {WordMonth = "Aug";}
if (Month == 9) {WordMonth = "Sept";}
if (Month == 10) {WordMonth = "Oct";}
if (Month == 11) {WordMonth = "Nov";}
if (Month == 12) {WordMonth = "Dec";}
document.write(WordMonth+". "+myvar.getDate()+", "+Year);
// End -->
</SCRIPT>
```

If you want the full month to show, just change the month in the code to a long format ("January") and you are ready to go!

Vertical marquee

Step 1: Simply copy the code below into the <body> section of your web page:

```
<script language="JavaScript1.2">

//Specify the marquee's width (in pixels)
var marqueewidth=150
//Specify the marquee's height
var marqueeheight=150
//Specify the marquee's scroll speed (larger is faster)
var speed=2
//Specify the marquee contents
var marqueecontents='<font face="Arial"><strong><big>Thank you for visiting <a
href="http://mde.net/cio">MDE Enterprises.</a> If you find this script useful, please consider linking to us
by <a href="http://mde.net">clicking here.</a> Enjoy your stay!</big></strong></font>'

if (document.all)
document.write('<marquee direction="up" scrollAmount='+speed+'
style="width:'+marqueewidth+';height:'+marqueeheight+'">'+marqueecontents+'</marquee>')

function regenerate(){
window.location.reload()
}
function regenerate2(){
if (document.layers){
setTimeout("window.onresize=regenerate",450)
intializemarquee()
}
}

function intializemarquee(){
document.cmarquee01.document.cmarquee02.document.write(marqueecontents)
document.cmarquee01.document.cmarquee02.document.close()
thelength=document.cmarquee01.document.cmarquee02.document.height
scrollit()
}

function scrollit(){
if (document.cmarquee01.document.cmarquee02.top>=thelength*(-1)){
document.cmarquee01.document.cmarquee02.top-=speed
setTimeout("scrollit()",100)
}
else{
document.cmarquee01.document.cmarquee02.top=marqueeheight
scrollit()
}
}

window.onload=regenerate2
</script>

<ilayer width=&{marqueewidth}; height=&{marqueeheight}; name="cmarquee01">
<layer name="cmarquee02" width=&{marqueewidth}; height=&{marqueeheight};></layer>
</ilayer>
```

Highlight table cell with mouseover

This small piece of code allows you to highlight an entire table cell on mouseover and create a hyperlink url to any web site you choose. Simply add the following code to your html Body section as needed for the effect you want.

```
<table cellpadding=5 cellspacing=0 border=0>
<tr>
<td align="center" width=150 onclick="window.location='http://www.bravenet.com/index.php'"
onmouseover="this.style.backgroundColor='#FFEB5D'"
onmouseout="this.style.backgroundColor='#FFFFFF'" style="cursor:hand; border: 1px; border-style: solid;
border-color: #000066; background-color:#FFFFFF" align="left"><A style="text-decoration:none;
color:000000; font-weight:bold;" HREF="http://www.mde.net/cio">Learn more about MDE
Enterprises</a></td>
</tr>
</table>
```

Scroll bars color customization

Customize your web site by coloring your document's scrollbars. Visible in IE5.5+, every aspect of the bar can be colorized, from the arrow heads, bar background, to even the bar's shadows. Just add the appropriate color code at the end of each line item below. Three of the items have been completed to give you an example.

Just add the following stylesheet into the <head> section of your page:

```
<style>
<!--
BODY{
scrollbar-face-color:#75EA00;
scrollbar-arrow-color:brown;
scrollbar-track-color:#EEEEEE;
scrollbar-shadow-color:'';
scrollbar-highlight-color:'';
scrollbar-3dlight-color:'';
scrollbar-darkshadow-Color:'';
}
-->
</style>
```

Eliminate the 'right click' on your web site

If you want to protect images that you use to enhance your web site, you can protect them by eliminating the ‘right-click’ capability that gives the user the option to copy and save the image onto his PC. Simply add the following code to your html code of your web page.

```
<script LANGUAGE="JavaScript">
function click() {
if (event.button==2) {
alert('DO NOT STEAL! --Your message here--');
}
}
document.onmousedown=click
// -->
</script>
```

Entrepreneur Tips

I have found these tips helpful in building my business and shared them in some of the early newsletters we published. This section is no longer included in the Practical Technology Tips Newsletter as we focus it exclusively on IT Manager topics.

Many articles are very appropriate for you to think about in an IT Manager role. We hope you like these articles.

Recurring revenue

Most of us want to do well – financially, personally, or professionally. If you didn't, you would not be reading e-zine publications and be interested in self improvement topics.

I've always had a passion for developing my own business and creating things that help others while contributing financially to my family. As I've gone through corporate roles, mostly Chief Information Officer (CIO) positions, I've seen many things that have helped certain companies become very successful.

One of the most important is in having a "recurring revenue" stream. A company that has a revenue line coming in consistently can build on that and has a much better ability to manage the sales droughts that can happen. Many technology companies have built their business on software development and when they do they all establish an ongoing support maintenance revenue stream. That base support revenue helps cover fixed expenses and by doing a good job creates an automatic prospect base that is likely to buy more products. IBM and Microsoft are some of the best examples in the world of growing their business from their existing client base.

The proliferation of web site development and hosting is another example of creating a business that establishes an ongoing recurring revenue stream. After the web site is developed the hosting fees allow the company to provide ongoing maintenance to the site as well as to develop new tools and techniques or services for its client base. It's a win-win for both the company and client.

My recommendation is that as you develop your business plan (and if you haven't done that you should), be sure to include at least one form of recurring revenue into your overall revenue mix. As you grow and become successful, you'll be glad you did.

The key to getting new clients and retaining them – Excellent Client Service. More on that later.

“Overdeliver”

Getting clients and retaining them is key to any business. Much of the revenues generated by some very large companies are from their recurring client base. Many successful companies throughout the world understand the value of excellent client service and a term of “overdeliver”.

I have always included that in part of my thinking throughout my career. Granted, there are questions as to whether I actually “overdelivered” in many situations but the thought was always there to do every job completely and with high quality - something that’s not always easy to do.

I’ve shared an Infiniti story with many of my friends before. It emphasized the value of a company that “overdelivers” to me many years ago. I got in my car one morning in 1990 to go to work and the battery was dead (probably because I left the door open). I took my wife’s car to work and she called the car company. After 6 phone calls from them as they followed up with her on every step of the process, it just blew us away at the care they took for their client and how well they communicated so we were never asking ourselves, “What’s the status?”. This occurred in 1990 and I still drive an Infiniti 11 years later - does that tell you something ?

When you give more than what the customer was expecting you build a long term relationship. Those relationships pay dividends in new sales and loyalty to your cause. You can take this to another setting. “Overdeliver” to employees and they will climb mountains, overcome obstacles, and remain extremely loyal to you. Isn’t that worth working a little harder for ?

How do you “overdeliver” ?

- Over communicate when there is a problem. Never make the customer guess.
- If an item gets to the customer and it’s not right, replace it or refund the money without question. A bad situation remedied can also cause that customer to lead others to you.
- Add something free to a purchase. The little things make a big difference.
- Be sincere and genuine about caring for your client’s appreciation for your product or service and tell him.
- Always be on time, communicate when you can’t be, and follow-up on commitments relentlessly. You will be surprised at how many people don’t follow-up on commitments.

Obviously, there are many more that go with these examples. Always look at it in that whatever you do, it has your name on it and you want everyone to appreciate the goods and services they receive from you. It will help you add new clients and certainly offers the opportunity of selling more to existing clients.

Client Service

One of the greatest assets you have is your client base. Clients buy because there is perceived value for the product or service that you offer. Only after they receive that product or service do they really know if that's actually the case. Your ability to deliver what you said you would in a high quality manner is key and gives you the opportunity for additional sales.

In my last issue I talked about "overdelivering". This concept goes hand in hand with client service. After the sale is made it is very important for you to provide excellent support of your products or services. Being responsive to questions or problems can create an opportunity for you or can cause you to lose the client forever more. Err on the side of "opportunity" !!!

IBM, HP, DELL, Microsoft, Home Depot, and thousands of high quality companies understand the value of an existing client and recurring sales opportunities. In fact, when I was an employee of IBM in the late 70's (yes, I'm older than dirt, , , but still having fun), it was common knowledge that about 70% of annual sales came from the existing client base and not from new clients. You better believe in those days we were very aware of the importance of client service.

As your business grows, start tracking your client service calls and look at the trends. Go after the issues that are causing problems and prevent them or position yourself to handle them quickly if your client thinks they are important. You want to make the sale and the process of your client using your product or service to be as smooth as possible. When it's completed, you want every client to say, "That is better than 'sliced bread'."

Put yourself in your client's shoes and tweak your products and services to provide added value that they need to have. Make it easy for them to do business with you. On your web site, add a set of FAQ's that answer many of their questions before they have to call you. There are zillions of ways you can improve client service and gain a client for life. Take the time to understand his needs. After all, once you have the client, "he's yours to lose" as the phrase goes, or a better thought is "he's yours for life".

Add-on Sales

Secondary sales, follow-up sales, or add-on sales, , , whatever you want to call them, they can be very profitable. If you have a solid product and have been fortunate to sell that product to several clients, don't overlook the opportunity to sell additional items to your client base.

If a client has already bought from you, it's a very good possibility the same client will purchase additional items, especially if they found the first product to be of value and high quality.

Follow-up sales have higher profitability in that your marketing costs are lower per sale. Contacting an existing client base is much less expensive than trying to establish a client base.

As long as you are providing products of high quality and that meet needs of your client, you have an excellent chance of selling your new products to every client that bought your first product.

Give your “Start-up” time !

One of the toughest things about being a “type-A” personality is in having patience for things to happen. I must profess that I have this challenge in a major way. Having been an IT Manager most of my life, I have gotten used to the idea that you go about business in a very simple manner:

1. Identify issues and risks
2. Determine priorities
3. Focus resources on the priorities
4. Communicate your actions
5. Monitor the activities and “tweak” where necessary.

In other words, identify, prioritize, and execute. I’ve often characterized myself as a “problem solver”, a “business strategist”, even a “fixer”. It has always been second nature for me to see things, evaluate options, and implement a strategy.

Trying to start a new business is something else. There are many similarities in managing an IT organization to trying to start a new business venture. There are also big differences that take a bit to get adjusted to.

The toughest for me has been in having the patience to know that any new venture takes time, , , and a lot of work. I have never minded the work, but the patience concept is a tough one. The point with all of this is that if you plan to start a new business venture, plan on everything taking at least twice as long and requiring twice the work to get it going than you think it will.

Very few ventures hit a homerun right out the gate. Most successes come from planning, deliberate action, follow-up and perseverance. Perseverance is the key word here. If you don’t have the energy and the personal fortitude to stick with it and to pursue your dream even in the toughest of situations, you shouldn’t bother trying to get it off the ground.

When you build business projections, be extremely conservative in the beginning. The results are probably going to be less than what you hope they will be in the early days and months.

The bottom line - give yourself ample time to allow the new business venture to develop and to gel. It doesn’t happen by itself for sure, and any business worth while takes time to mature. What’s that old saying, “crawl, then walk, then run” ? Most things in life are like that.

Develop Your Interests

How many times have you heard, “You should follow your passion when creating a business.” That’s exactly what I have tried to do as we build and grow MDE Enterprises. I have several passions that I want to follow – one of them is a little white ball on green terrain.

Seriously though, your persistence is heightened the more you love what you do. Whatever you do, to do it well usually requires hard work and perseverance. Professional golf seems like it would be so much fun, and it would. It also takes a lot of work and commitment to compete successfully.

In following my pursuits, I decided to address several key aspects that motivate me. These items are:

1. Helping others
2. Writing
3. Using my creativity
4. Generating online revenue sources

I also plan to write that golf book I’ve always wanted to write some time next year. It’s titled “**Up and Down From the Ball Washer”**. It will fuel my love of golf, provide a means of helping others, and now that I have an internet infrastructure in place will hopefully create an additional revenue stream.

It took a lot of work for me to get to the point that I could provide my creative works to others through the internet. Many hours of research, misfires on certain approaches, lots of late night efforts, and finally it is in place and works very well. The thing that keeps me pushing and working the long hours goes back to the four motivational drivers above. Each item plays a big part in my psyche to push for success, something that is still out in front of me but every step takes me just a bit closer.

Whether your passion happens to be writing, teaching, managing, or developing software, take a close look at what makes you “want to jump up every day and get after it”. Having a love of what you do makes all the difference in the world.

It's All in the Numbers

For all you true entrepreneurs, what I'm about to tell you comes as no surprise. Wealth can be generated by selling a $10 item, even a 5-cent item. It's true! Create a situation where 1,000 people will pay you $10 per month for a product or a service and you have a very nice steady income of $10,000 per month. Find just 10 people that need a product or service for $1,000 per month and you generate the same income.

I've always heard the story, but haven't confirmed it, that one of Atlanta's multi-millionaires got his wealth in such a way. The story goes that he developed the code that banks still use to manage their ATM machines that you see at every bank today. In the late 70's and early 80's this was a new concept and quite a few people thought that it would never go over with the public. Those same people undoubtedly are now looking for gas stations that have full service. Remember those days ?

At any rate, the story goes that this guy decided to take a commission payment of a penny on every transaction utilizing his software for 20 years rather than taking a contract fee for his time. It was a high risk with so much uncertainty of the technology at the time but he apparently knew something. If the story is true, he now lives in a home worth $35 million or more.

The point is that if you find the right product or service that has lots of appeal and repeat business, you don't have to charge much as long as it does not cost a lot to provide it.

I'll expect my 5% commission on all new startups as a result of reading this story.

Headlines are Key

"Top 10 Words Used In The 100 Most Successful Headlines Of All Time."

you	31
your	14
how	12
new	10
who	8
money	6
now	4
people	4
want	4
why	4

"The 21 Magic Words That Can Make You Rich!"

suddenly	miracle
now	magic
announcing	offer
introducing	quick
improvement	easy
amazing	wanted
sensational	challenge
remarkable	compare
revolutionary	bargain
startling	hurry

And last, but certainly not least (and probably more effective than any other motivating word).

"FREE !"

The headline is the single most important part of your marketing success.

Before your prospect ever gets to hear your benefits, get to know you, hear your offer, they must first see and be attracted to your ad. So you could say that..."Your Headline Is Your Ad...For Your Ad!"

As a matter of fact, you would be very accurate if you say that 80% (or more) of the success of any offer or ad is the headline. So be very sure to spend lots of time trying and testing different headlines. You will want to spend most of your time on developing your headline. It is the one part that will make a difference in your ads, press releases, proposals, and just about anything you are trying to sell.

How does this tie to technology, you might ask. In today's world, there is a marketing or selling aspect to most anything that you do, especially as an IT Manager. It might be selling a new project idea or something to your CIO, or it may include selling a significant technology investment to your CEO and Board of Directors. Either way, having a few basic marketing skills will help you in your future, no matter how technical you are.

Dream big dreams

I've always kidded my wife that on my tombstone she will be able to carve one of two things:

"***He hit it big !***" or "***He died trying.***"

Well, I'm still trying but I haven't lost confidence in what I believe my ultimate achievements will be. To many, I'm considered very successful. My parents were both proud of the level of accomplishments I have achieved which are far beyond most that I grew up with.

Well, my current business model is one that has been in the works for years and I have almost gotten to the type of life I want, one that has a successful internet sales mechanism that runs itself and that does not require me to be personally involved every minute of every day.

When you look to your future, I've always thought that you should have "big dreams". To win a lottery of $30 million has exactly the same odds as the $2 million lottery. It's a mathematical guarantee that the odds of hitting all the correct numbers are the same for both lotteries. When I think of winning a lottery, it's always for at least $30 million. That may have something to do with the fact that I only play the larger lotteries.

In my internet business, I realized about a few months ago that I had been looking at it all wrong. I was focused on how to replace my income that I had as a company CIO. What I should have been thinking is how to generate three to four times the income because the opportunity is there by taking the appropriate steps. No one said finding the right steps is going to be easy.

So, as you sit down to develop your 2002 goals, take a stab at targeting something big. You might surprise yourself because in trying to achieve a big goal you will get many other smaller things accomplished along the way.

My situation is a perfect example. In 2001 I was able to develop 7 of the 10 publications in the IT Manager Development Series, define my next project or two after that, start a monthly newsletter, and build an internet infrastructure to market and take credit card orders online. This was done by someone that has never really been a writer before and one that is considered a technically oriented manager but not a technical person. All of this was done while managing a large contract with a company that I was providing consulting services for.

The first part is to identify where you want to be. Once you really know, it's a matter of executing, something we can all do if we want something badly enough.

Develop a Business Plan

Every company needs a "guiding light". The more you can define what you will accomplish the more likely you will achieve success. A business plan does not have to be 80 pages in length. Whether you manage an IT department, provide consulting services, or own your own business, you need a plan. Elements of a plan that work to help you achieve successful results include:

Mission Objectives: Define what you want to accomplish as specific as you can and build planning components that supports your mission statement.

Clients: Clearly define who your clients and prospects are. The more specific you can be the better.

Sales/Marketing: Define how you plan to sell your products and/or services. Target your efforts for greater results.

Budget: Knowing how you plan to spend and make money goes a very long way toward helping you achieve success. You will reinforce your overall objectives by putting into place a financial plan. Develop an achievable plan with room for error.

Target milestones: Set quarterly objectives to help you reach your objectives. You may find it amazing in that when you track and report results against a plan, you tend to achieve more than when you don't. Part of the reason is that the analysis and awareness that you create reinforces within your mind your true mission. It's easy to get sidetracked.

Measuring yourself or your organization against a business plan helps keep you focused on the real objectives.

Planning does not have to be difficult or complex. Keep it simple and to the point of what's truly important to accomplish your objectives. I've seen high level plans on one page of paper be very effective in multi-million dollar corporations.

Start Your Own Company

One of the best tax deductions you can have is by having a home based company. Whether you operate a full time operation or have a second income from a part time operation, the tax deductions can mount up. It's too late for filing taxes for last year but you have plenty of time to start something this year that can benefit your tax situation for next year.

Understand, I'm not proposing that you do anything illegal or unethical and you should always seek the advice of an accountant if you aren't sure about an issue. What I do suggest is that there are many legitimate tax deductions available to us all when we operate a revenue generating business, whether it's our primary source of income or a secondary source.

You might take photos of soccer teams and sell them to parents, develop and sell software as a sideline business, or you may buy and sell items on EBAY for a profit. Any legitimate revenue producing business gives you the opportunity to deduct expenses related to generating those revenues.

Expense deductions include travel, entertainment, office equipment and supplies, advertising, consulting services, postage, even partial home expenses. Again, seek the advice of a qualified accountant on what your specific opportunity might be.

You don't have to incorporate the business and spend a lot of money on legal fees to set yourself up as a sole proprietor. All that is really required is to complete a Schedule C at tax time and to maintain proper records to substantiate your revenues and expenses. As your business grows, you can incorporate if it makes sense to do so.

You also do not have to make a profit to be considered a legitimate business and to be able to take valid tax deductions. You should make a profit at some point to insure an audit does not consider your operation a hobby.

Pull out a Schedule C tax form from the IRS sometime and do a quick calculation of the revenue and expenses that you might legitimately have in a year. You might be surprised at the amount of tax deductions available to you. If you are in a 25% tax bracket, every $100.00 of deductions saves you $25.00 in tax. The tax savings can mount up.

Publish Your Knowledge to generate a secondary income

I discovered the idea of writing and publishing the **IT Manager Development Series** almost by accident. I had long thought about writing a book and selling it over the Internet but the topic was always going to be a subject on golf, a game that I have loved all of my life and at one time was pretty good at. After I left my corporate CIO role in 2000 to start my own IT management training and consulting business, it struck me that what I should write about was what I knew the most about – managing IT organizations. Helping companies and mentoring individual managers achieve more through technology also seemed very rewarding.

Writing ten books right off the bat was aggressive to say the least, but now that they are complete it is very gratifying. After finishing the tenth and last book of the series in March it dawned on me that consultants in general do not normally take full advantage of sharing their knowledge with others. In my management life, I've touched a thousand people or so; in the Internet world I have started touching many thousands of people.

I know that when I was the CIO or IT Manager of a company, I would have paid for practical material that gave me or my junior managers a road map with insight on how to manage an IT organization successfully. More than that, my company would have gladly paid for material that helps improve performance. The point is that most of us have experience and knowledge that is needed by others that do not have it and would consider it valuable material to have. My experience in just the last year has validated this perspective many times.

Because of the success I've had with my content, I decided to write a series of four articles for the IT Consultant Community of TechRepublic to share the steps I took to publish and sell my information through the Internet. Three of the articles have been published and can be accessed through the links below. The fourth article on Marketing is yet to be published. I also developed a simple guide that provides an overview of the articles titled the **"4 x 4" Road Map to Selling Publications on the Internet**.

I wrote this series because I believe it can help other consultants, and IT Managers for that matter, generate secondary incomes. More importantly, the information they have is truly valuable and most us will pay for it when it helps us learn something quicker or to implement a new technique faster that leads to positive results. With the Internet, I'm reaching thousands of people and so can you.

The articles and the Road Map can be retrieved by clicking on the title below.

I. Repurpose your knowledge to create a second revenue stream

II. Developing an Internet infrastructure for online sales

III. Six steps to publishing your own material

My **"4 x 4" Road Map to Selling Publications** is also available to be downloaded from the Internet (It is formatted in M/S WORD.) Download by going to: http://www.mde.net/tools/roadmap.doc

If you are interested in providing information to help others and that generates additional income, I think you will find the free information valuable in offering a short cut by observing what I did to achieve this objective for my company.

Follow-up sets you apart

In these days of advanced communication capabilities, it seems that many people lack an understanding of how to use them. What I'm getting to is that it appears to me that more people than ever lack the common courtesy of following up with an email received or a phone message left for them.

One of the things that I learned early in my career was the importance of responding to a request, even if you don't have the answer. People generally don't like not getting an answer to their question, but I have never really met anyone that got upset with a response of "I don't know."

In the era of electronic automation, it seems to be easier to leave people hanging or not to respond at all. The image it creates is one who lacks professionalism and common courtesy.

Something to consider the next time you miss that phone call or get an email message that is looking for a response. Simply sending a reply to an e-mail that you got the other person's message can go a long way toward creating the professional image we should all want to have.

Keep an "IDEA" File

One of the things that I have always done is to maintain an "idea" file. I have watched others make significant progress in their efforts over the years and I have always tried to emulate the things that appear to be successful. We are all complex individuals that are made up in large part by what we experience during our lifetime. Those experiences, both good and bad, have an impact and ultimately cause the makeup of our personalities, our approach to work and fun, and in many ways how we look at things. I'm certainly no psychologist (Wasn't hard to figure out was it?) but I do know that your accomplishments are often made up by what you observe in others.

Early last year, I began writing my life's work in ten books you probably know as the **IT Manager Development Series**. As I began writing, I was constantly thinking of points, examples, and information that I wanted to include in the book I was writing. Often an idea would pop up that needed to be included in one of the future books. I started a list by book title for all ideas that came up but couldn't be developed at the time. It was a great reference tool for me when I began writing each new book.

Many of you also know that I write articles for TechRepublic.com. I'm always thinking about the topics for new articles for either the IT Consultant or their IT Manager newsletter. Yes, I maintain a "future articles" file for that as well. It's nothing elaborate, just a note written down and scanned into my PC and kept in a "future article" file. When I need to submit a list of possibilities, that's where I go first.

Marketing is the key to any small business. My background is in operational management of technology resources, not marketing or sales. As I try to learn the "in's and "out's" to discover what will work best to grow my company, I'm always making a note or saving something that I run across that looks like it would help my business. Many of these notes never get worked but many do and those that do often make a real difference.

Bottom line - when you think of something good, write it down so you have the opportunity to use it later. Don't write it down and you potentially lose the concept of a true inspiration forever.

Feel free to send this newsletter to others in your network. Past articles are at www.mde.net/ezine and anyone can sign up. For more free articles and IT manager tips, take a look at past editions of the MDE Newsletter at www.mde.net/cio and the expanding article list on my web site.
HAVE a GREAT DAY !

Do it yourself or out-source it

There is a lot of talk about companies outsourcing much of their support requirements these days, especially for technology support. As a consultant, I'm a proponent for that in one sense. As a business owner, I tend to take an alternative view of it.

A small to medium size company can certainly benefit by having a seasoned manager come in to help the company get its IT department focused and on track with the company's needs. Outsourcing is an excellent means of getting senior level talent that company might not be able to attract otherwise.

On the surface, it may appear that a company pays more for a consultant but the results in having a seasoned manager with skills to assess, quantify issues, and prioritize them for a company can be worth much more than the expense incurred, especially when you consider that an experienced manager can help you go much faster.

In developing my own business, I take a slightly different perspective. I'm much more comfortable in new ventures when I have a good understanding of the issues and dynamics of the venture. In other words, I feel a lot better about something when I have some reasonable level of understanding of the subject.

An example is how I have gone about developing my Internet business. I can give you at least three parts of the business that I had no real knowledge of until I researched it and learned what I needed to know.

First, I wasn't an author and had only published one piece of work in my life. My expertise has always been in managing technology organizations. In just a year's time, I have written ten books on IT management and had over forty articles published. I decided to write about what I know and found that people are interested in what I have to say. Writing is hard work like anything else but the rewards are just as great.

Second, I knew that I had to create a secure order process for my web site. I researched this topic many hours before settling into using GoEmerchant. The research and understanding of online ordering was worth the effort because I couldn't be happier with my merchant account service plus the capabilities of other services wouldn't have met my needs. It also helped me to understand the full aspects of ordering online. In this case, I'm actually outsourcing the service but the process I went through gives me a very solid understanding of the process.

Third, I'm in the process of constantly learning about marketing, promotion, etc. I don't particularly like this aspect but it's a "must have" to develop and grow any business. There are times that I wish I could just outsource this entire part, but I know that my business will be more healthy long term if I have a full appreciation of the marketing and sales dynamics.

So, what is my message? My belief is that to use an outsourcing service, you need to have an appreciation for what the outsourcer provides. How else will you know if you are getting a good deal and value for your payment? I don't believe you have to be an expert but you certainly must know how to evaluate the outsourcing organization's services and if you don't have a clue about it you will have a very difficult time.

Do your homework and take an approach that allows you to try the service without locking into a long term contract or an approach that allows you to take a closer look that creates minimal risk, cost, or effort. I believe in outsourcing very much; I just want to understand what I should be getting before contracting with someone.

Align yourself with winners

Whether you are looking to improve your professional skills or looking to add supplemental income to your home based business, you should always try to affiliate yourself with proven winners. There are a lot of people out there that talk a good game but "when the rubber meets the road", you want to work with those that are professional, have high ethics and achieve consistent success.

All of my management life I have tried to incorporate into my set of skills and traits the things that I saw that were effective for others. I've often told my friends that I have generated very few original ideas but I have always been able to learn from others and to build upon the base of knowledge that was developed during my early years. I have had positive successes in managing IT organizations for many years. More of my success is attributed to what I learned from my mentors and observing others than anything else.

Observe others and look for things that work for them. It may be as simple as remembering people's names or having an ice cream break for your employees that helps them know you appreciate their efforts. If you watch successful managers closely, you will soon have dozens of examples that you can incorporate into your own style of management. You should also watch for things that fail. Some of the best lessons are discovering what doesn't work. That's how I learned not to be the first to install a new software release. At IBM in the late seventies, the SE that was very aggressive to install all his clients on the latest software release also had a lot of repair work to follow-up with. Initially, I thought he was being very proactive. We both learned that it was being a bit naïve due to experience.

Winners and successful managers get to the destination quicker and with less energy. Because they know how to go about a new initiative, they require less energy and create less stress on the organization to reach new milestones. There are a lot of managers in the world that charge ahead without paying attention to the consequences and the casualties that are required to achieve the objectives to be successful.

Winners are positive thinkers and create positive energy. Surround yourself with those types and you will find yourself being a positive force. It sure makes a big difference in the quality of your life to be around positive forces.

Mentors and successful managers are valuable to anyone wanting to assume more responsibility. Take advantage of what you can learn quickly by aligning yourself with winners.

What is an entrepreneur?

I have been giving this question quite a bit of thought lately. For most of my life, I have been a corporate employee and had achieved reasonable success as an IT Manager and CIO. I have been fortunate to work with many excellent people over the span of my career and will always have fond memories of many events and relationships.

For some reason, I have always wanted to do something of my own. I know many people that are very content to be a part of a company, I guess because of the relative security of being an employee. I believe that over the next twenty years we will see a tremendous movement of people making efforts to do more on their own and to create more independence for themselves. I know that I love the flexibility of working from home and the sense of accomplishment I get by running my own successful company, no matter how small it happens to be.

MDE has grown significantly in the last year. I began writing articles for TechRepublic and completed ten books on the topic of IT management principles from a practical, true to life experience point of view. I had written one item in my career prior to this adventure so I never thought I would become a "writer", and I use the term loosely. I also never really thought I had a creative side to me—I always thought I was very logical and structured. I'm finding that the creative path is a lot more fun, and when applied right can be very profitable.

My definition of an entrepreneur is someone that goes outside the traditional walks of life and creates a path of his/her own. I took a risk in November 2000 that has started to pay off—both financially as well as being personally gratifying. I can honestly say that in the past year I have worked harder than ever before but it doesn't seem like hard work because it has been so much fun.

Every entrepreneur has to have perseverance to achieve success. Every successful business I'm familiar with (apart from the dot.com companies of the past) started relatively slowly and through hard work, focus, and perseverance became a viable business entity. I can list many companies and people that are tremendously successful today that had very meager beginnings. Perseverance is possibly the greatest asset an entrepreneur can have. It is easy to remain with a winning team; it takes a lot more character to stick with a struggling organization and to help it achieve its full potential.

Entrepreneurs tend to be flexible and adaptable in order to take advantage of opportunities. A true entrepreneur "smells" opportunity. Part of the reason is that they are always looking for the opportunity in most situations while too many people look at the negatives of a situation. Positive attitude and seeing the "glass half full" as opposed to "half empty" actually creates an opportunistic environment for the entrepreneur.

I hope to be considered a successful entrepreneur one day. With focus, hard work, and perseverance, I just might make it a reality.

Test your ideas

Being an entrepreneur suggests that you are a person that comes up with lots and lots of ideas. New ideas are good as long as you aren't simply jumping from one idea to another without doing something about it. Being able to develop a tremendous amount of new ideas is also a good thing as long as you don't allow yourself to get "snagged down" and avoid spending a lot of money in areas that don't "pan out".

Testing an idea is key. Over the years I have had many, many ideas that I thought were worth pursuing. One of the things that helped me grow my Internet business to the level it is and as fast as it has grown is because I have tested many theories leading up to this point.

For example, in the mid-1980's, I wrote a piece of software for the PC when there really wasn't a lot of software. I even sold a few copies of **Cash Flow Manager**. The idea was a good one but it didn't fit my desire to create a low maintenance oriented business model. Software support just wasn't what I wanted to do.

In 1998, I bought and sold a lot of items through EBAY. This was another test to learn what the deal was to buy and sell products over the Internet. Until you have done it, you don't really understand the pros and cons. It was in this test that I discovered the challenges of selling a product that you had to maintain an inventory of, etc.

Don't get me wrong. Many of the business models that I have tested in the past fifteen years have been tremendous opportunities, but they didn't fit my business goals.

With my business in full force today, I still test. For example, right now I'm testing three marketing initiatives to determine what works best for the money and effort in creating new awareness of my IT Manager Development Series. Testing allows you to determine effectiveness without spending too much money or investing an inordinate amount of time.

When you find something that works, repeat it. When it continues to work, incorporate it into a normal process.

Stay with your strengths

We all have our strengths, , , and weaknesses. It is hard to be good at everything. I learned early as an IBM salesman that sales was not my 'cup of tea'. Little wonder that my career has been absorbed in technology management versus sales. It has been a great career and one that I'm proud of, but it probably never would have happened if I had not had the sales exposure early in my career.

We all need to take an objective assessment of our strengths and weaknesses. I've mentioned that one of my weaknesses is sales. Selling internally to the CEO, CFO, or the Board of Directors—no problem. But, put me in a convention where I need to find interested prospects and initiate conversations—forget it, you might as well go ahead and shoot me !!

One of the things that I'm trying to do more and more is to trade services. My skills are in assessing, organizing, prioritizing and planning. I'm also a strong employee motivator and have developed an excellent model for building an Internet business.

Currently, I'm testing a program where I pay for networking focus for my company. I find that my time is better spent finding people that can drive the marketing awareness efforts while I focus on developing more material for my IT manager clients. Everyone has core competencies and being able to understand what they are and keep yourself focused on your strengths tends to have better results, in my opinion.

Don't get me wrong. I know the value of marketing and selling, but you have to use your resources wisely, no matter how big your company is. Companies that find arrangements with other companies that lead to mutually beneficial results have more success, and it's always more fun working on the things that you truly like to do.

Create multiple revenue streams

We have all heard the adage, “Don’t put all your eggs in one basket.” before. Many of us have been burnt by doing this. In fact, sometimes it is hard to keep it from happening. Here are a few examples:

- Putting all your investments in technology stocks
- Holding onto all your company stock options until the price gets higher
- Remaining the employee of a company without evaluating your options and developing an alternative plan

In a small business, you need to have more than one source of revenue. You can’t always control the events that lead to sales of products and services although you can certainly influence them. Take prime examples like the buggy whip manufacturer. Ultimately, his business suffered from a lack of need for lots of buggy whips. So too did events in the world affect many of the dot com companies that flourished in the 90’s. All of a sudden, many went out of business when people decided they needed products and services from companies that were viable and stable and could show a profit.

My business is simple as I focus on helping IT managers all over the world. I have four revenue lines that generate consistent revenues. My revenue base is made up of Internet sales (books and published articles), IT manager training services, IT consulting services, and company affiliations.

The goal with any small company should be to develop multiple lines of revenue that help take up the slack when one of them is down. It makes for a better peace of mind and a smoother revenue flow for your company. You might also consider this as an employee. Too many people get caught off guard when a company has to downsize. Having a small part-time revenue stream on the side can help you put money aside for future needs and will buffer the impact if you ultimately have to leave your company prematurely. Nothing is a guarantee these days so it makes sense to put alternatives in place for yourself and your family.

Products and Services Review

The very first newsletter published included a product review. Many products and services I use in my business or personal life make things easier and provide lots of benefit so I decided to share information with our newsletter Subscribers.

Many of these items were discovered from friends, research, or from newsletters such as this one. The point here is that I like sharing things that are helpful with others who might be interested.

PayPal

Do you need to accept credit card payments or make payments with anyone that has an e-mail address and do it electronically without having to have a bank merchant account ?

PayPal is free and works extremely well. Let me give you an example:

My brother wanted me to sell a camera tripod on EBAY for him. I accepted the challenge and blew him away with the results. Here's how simple and fast it worked:

1. We created the EBAY auction and took the option that if the first bidder would pay what my brother wanted, the auction automatically closes and the bidder wins the auction immediately.
2. The first bidder liked what he saw and bid the amount my brother wanted. As the first bidder and bidding the "sell immediately" price, he won the auction and it closed.
3. The bidder and I (the seller) both get an e-mail from EBAY saying the auction has closed because a winning bid has been submitted.
4. I send the bidder payment options and ask for shipping information.
5. The bidder opts to pay through PayPal. That was good for me since I receive the money faster through my existing PayPal account.
6. I receive payment notification (through e-mail) that the bidder has made payment and it's available in my PayPal account (works similar to a bank account in that I can receive or spend money out of it).
7. I call my brother and ask him how he wants me to pay him and that he needs to ship the tripod. I suggest that I can write a check or that I can pay him electronically through PayPal. All that's required is that he register as a PayPal user at no charge. He decides to join the 21st century and asks me to pay him through PayPal.
8. I initiate a "payment transaction" through PayPal to my brother's personal e-mail address.
9. My brother and I receive an e-mail about the transaction from PayPal. In his e-mail message he clicks onto an internet address that takes him to a secure PayPal web page that steps him through a simple registration.
10. Once registered, the money hits his PayPal account.
11. He transfers the money from his new PayPal account to his bank account.

All of this took just a few minutes of actual time. **It is very simple and works great !!**

If you're interested in taking a look at PayPal, or need to make an electronic payment to someone, click on the following link and try it:

https://secure.paypal.com/refer/pal=mike%40mde.net

PayPal also has other features that allow you to initiate a payment from an e-mail or from your own web site. If you need a simple approach to conduct a credit card financial transaction electronically without having to pay for a merchant account, you'll find PayPal to be an effective tool as I have. It's also well known and accepted in the online auction community – especially with EBAY users.

Efax.com

I began using a free fax service many months ago that works very well. **EFax.com** offers a free service for receiving faxes and automatically forwards the fax to you via e-mail. It costs nothing and is actually more convenient than the fax machine at times, especially if you need to receive a fax while on the road.

Once you become a free member, they issue you a fax phone number that is yours and only yours - just as if you had a fax machine in your office. The only downside I've seen is that the number is a long distance phone number from my Atlanta location, but most faxes I receive come from out of the city anyway so it doesn't really matter. My fax number is 253-663-3327 in case you're wondering and it's the number I list on my business card. The convenience of being able to get a fax by e-mail makes this approach a real plus.

They also offer an outbound fax service for a nominal fee, but I haven't had the need for that part of their service. Check them out at www.efax.com . I have found the quality and service to be very good.

GoEMerchant.com – Shopping Cart and Secure Credit Card Merchant Account

I must have spent over 100 hours looking for and reviewing shopping cart capabilities for a retail shopping center my wife and I were putting together. There are hundreds of them, many are great products. I looked at everything from buying my own software package to using a service. Both approaches had positives as well as negatives.

I had several requirements in my pursuit of the "perfect" shopping cart application. In reality, there is no such thing as a perfect application, but I believe that my selection comes very close to my definition.

My requirements were:

- Shopping cart ease of use and simple navigation
- Merchant account for VISA, Master Card, Discover, and American Express
- Low fees
- Simple to implement and maintain
- Ability to handle unlimited number of products
- Ability to set up the capability on different web domains (This was actually the major hurdle in my search. Most tied me to one web site)
- Ability to sell the same item on multiple web sites
- Ability to have flexible option selections on an item (size, color, etc.)
- Flexible shipping charges
- Automatic tax calculation for purchases from Georgia residents, but not in other states.
- Responsive support
- Credit card statement needed to reflect "MDE Enterprises".

I could go on but I won't. The point is that I had very specific criteria for what we wanted to do today but also things that we anticipated we would need in the future.

As I mentioned, I spent many late nights looking at all types of products and assessing their capabilities. It wasn't until I discovered GoEMerchant.com that my search criteria started to all fall into place. To look at their offering click on the link below.

http://mdeenterpr.evsholdingco.com/

The thing that ultimately sold me was the ability to create flexible "Buy" buttons in the Shopping Cart module that I could use as often as I wish and on as many web sites as I wanted. It also gave me a very easy setup facility that was simple to use. I checked out their demo and tried it before buying and the demo worked very well the first time. Many of the other products that I had looked at were cumbersome or didn't work at all.

The neat thing about the application is that I can sell as many different variations of products on dozens of web sites if I want, but when the user clicks on a "Buy" button to buy an MDE product from any of those different web sites, he will be using the same shopping cart and secure credit card processing engine every time. In addition, the Shopping Cart has nice visual appeal and displays my company name at the top which is a nice touch.

Another nice touch and one of my requirements is that the credit card statement to the buyer shows the charge being from MDE Enterprises which reduces confusion if some other company name is listed on the credit card statement for the purchase. While we are talking about credit cards, I had to have the capability to enter phone-in or mail-in credit card orders as well as take them on-line. This application gives you that capability.

This product has a very flexible upload option that can use EXCEL, comma delimited text files, etc. And I can tell you from experience that if you deal with a lot of items, you have to have file upload capability.

There are other nice capabilities that hit my “hot button” including the Cyber Circular capability that lets you announce new products to your client base through an e-mail. The client can purchase the item directly off of the e-mail they receive. This was not a requirement in my search but will be an important feature in my future initiatives.

I’m extremely pleased with the product and it has worked like a charm right off the bat. Support has been excellent and very responsive. That part actually surprised me. GoEMerchant.com is tied in with NOVA merchant accounts which is a very large, reputable secure credit card processor. Credit card verification is a key feature that is handled very well with this service.

If you are looking for a stable shopping cart / secure credit card application, you can’t go wrong with this one. If you need help setting one up for a web site, MDE Enterprises can help you get there very quickly.

Microsoft Publisher

If you are interested in an application that can turn your ideas into a newsletter or a web site quickly, you might want to consider Microsoft Publisher. This software package won't give you all the flexibility as Microsoft FrontPage or other web development tools, but for most it will do just fine.

Publisher has many design templates included and quite a bit of clipart to spruce up your publications. Whether you want to create address labels or company forms for your business, you can probably find a template that will streamline the way.

Another neat feature is that after you complete a newsletter for your friends, you can convert it to a set of web pages with just a few key strokes.

Every new release includes new features. Microsoft Publisher is an inexpensive way to develop excellent looking publications or web sites very quickly. Another nice part is that you don't have to learn html to develop web pages using Publisher.

Adobe Acrobat

Most people know about Adobe Acrobat Reader, the free tool you use to view PDF files. What a lot of people don't know is that Adobe Acrobat is actually a very powerful tool (the version with a cost), and not just a PDF file reader. If you have used the reader module, you have seen a lot of the power of Adobe Acrobat in that it works very similar to a book, moving from page to page and giving you the ability to print the entire document or just a few pages as you wish. It's a very flexible tool.

So what does the paid version offer that the reader does not ? The full version of Adobe Acrobat allows you to create PDF files from many sources including Microsoft WORD, EXCEL, and POWERPOINT with a single click. It also gives you considerable security control over the PDF file that is created. For example, you can place password protection on the entire document or for each page.

You also have the ability to create the PDF file with certain limitations. For example, it can be created with or without the ability to extract text from the file (ie. copy and paste), ability to print or prevent printing, etc. This tool provides excellent features and flexibility to allow you to protect your document to whatever extent you want.

There is another neat offering from Adobe. If you don't want to pay the $249.00 price ($99.00 for upgrades), Adobe offers another means of using Adobe Acrobat. You can pay by the month. Yes, you can pay $9.99 per month or $99.99 per year for unlimited file creation capabilities using their online approach. It works great. The only stipulation is that you have to sign up for at least a year. Pay it all in advance and you save.

One other great way to determine how Adobe Acrobat works and whether it provides you the features that you need is to try their free trial offer online. Yes, you can create up to 5 PDF files from any viable source such as M/S Word or M/S PowerPoint for free This offer works great as well and the conversion takes place with just a click or two – very nice. This offer is available at web site https://createpdf.adobe.com/index.pl/2938455373.02578?BP=IE .

So, if you have a need to share a document among many users and you aren't sure they have the proper software, convert it into an Adobe PDF file. All your users can obtain Adobe Acrobat Reader at no charge easily off the Internet and you're in business.

For more information on Adobe products, visit www.adobe.com .

Press-Release-Writing.com

Have you developed a new product and need to get the word out? If so, there are many ways to go about it. You can use a professional advertiser, you can do it yourself, or you can take advantage of one of the organizations that has learned how to use the internet effectively.

Recently with the completion of several publications in the **IT Manager Development Series**, I took a look at how to get the word out to my targeted audience. Reaching any market can be tough, takes time, and can cost a lot of money. In looking at the marketing campaign for my products I decided upon several approaches. One of those was to create press releases and submit them to appropriate publications in the technology and business world.

Years ago in a past business life, I helped develop a press release for a micro computer business application and the results were fairly good. This being the very beginnings of PC applications, it always stuck in my mind as something worth doing for future products. The cost was inexpensive and that was another criteria for my product releases this time.

After doing quite a bit of research, I happened upon a web site that intrigued me. There were others but this company seemed to have a nice listing of the publications that I wanted to submit my press release to. They also offered many different channels. I chose healthcare, business and finance, and the technology channels to get information to more than 5,000 publications editors.

Another consideration was whether to purchase assistance in writing the press release. In the first document, I had them write it for me even though I had already drafted what I thought would work well. The difference was considerable and worth the cost. My initial release went out two weeks ago to several thousand publication editors that subscribe to these services so I'm still waiting to see the full results. A future newsletter will let you know how it goes.

While there is no guarantee that the release will be printed by any of the publications, it only takes 3 sales for me to cover the entire cost of the press release development and distribution. If I achieve positive results, a press release for each of the ten publications in my IT Manager Development Series will be submitted over the next six to nine months.

Keep your fingers crossed.

For more information on press-release-writing.com, click on this link:

https://www.press-release-writing.com

Another helpful part of Press-Release-Writing's web site is the free information and guidance provided to help you write effective press releases. A free newsletter is also available. So, if you find yourself in need of getting the word out on a new product or service, you might want to try these services for a test drive.

Free Advertising at Access Atlanta

Recently, I had a desire to sell some equipment my wife and I had purchased in a previous business venture. The equipment was bulky and packed into several fairly large boxes. We could have sold the items individually but preferred to sell the whole lot to a single buyer to reduce our efforts. Another major incentive was that the equipment was taking up a large part of one room in our basement.

Introducing Access Atlanta (www.accessatlanta.com). I discovered this little jewel by accident while cruising the web looking for something else. As I looked through the content of the site I noticed a free advertising section.

Timing is everything. I had just completed packing all of our equipment to make it easier to transport to a buyer and was about to place an ad in the Atlanta Journal when I found Access Atlanta. I've tried free ads before with little success, but "what the heck". I decided to place an ad for the equipment and I soon discovered that the process was simple and the final listing was of high quality, crisp, and professional.

Within a week, a buyer called and bought $2000 worth of equipment and soon after my basement room was open for more storage. That's a good thing.

Access Atlanta has many features and is rich with content. Take a look around; you may have a local web site similar to this one that helps promote the sale of an item or to highlight a yard sale at no charge.

The point to this article is that there are many ways to get the word out. Whether you are selling an individual household item you no longer need or trying to sell a new product, it pays to take a look at free and other economical advertising offers available on the Internet.

XARA3D - 3D Graphics Generator Tool

I'm sure you've seen plenty of web sites that have really nice 3-dimensional (3D) text and graphics. You have also probable seen some with cool animated graphics. It gives their web site a professional look with depth and class. You can create your own 3D text with several font options and styles for free with XARA3D.

XARA3D is a great program with some very nice features. Try the free version and create 3D text of your own for a newsletter, your web site, a Word document, or a PowerPoint presentation. It's very simple to use and you are going to like the results.

The free version provides several options to customize your 3D text graphic including:

- 12 fonts
- 8 font sizes
- 6 3D styles
- 222 colors

Another nice thing about the free version is that it runs right on the web site versus requiring you to download and install demo software. In the healthcare world, that's called "non-invasive". If you want to learn more about the full version, there are links that will take you to the right place.

The full version lets you make buttons, animated gifs, banner graphics and titles for web pages and presentations. Samples are provided to show you what can be done.

A few samples I created from XARA's free creation program are shown below. Each took me about 10 seconds to create, copy and place on my document here.

For more information on XARA products, click here.

UltraSnap Image Capture Tool

Have you ever needed to take a snapshot of your PC screen display? Or maybe you would like to get a portion of a web site page to paste into your newsletter or your own web site. Creating an image that is high quality as you reduce the size is harder than you might think.

Well, MediaChance has a cost effective solution that's a "snap". It's called UltraSnap. Until I found this little jewel I was always disappointed with the screen copy images that I created for my web sites and newsletters. UltraSnap has saved the day.

I use it to take snapshots of Excel spreadsheets, screen images of web pages, and many other ways as I develop web pages, write articles and IT management books, and create newsletters. The software is easily installed as a trial offer so you can get used to it before you need to buy it which is always a nice feature. It also has many convenient features such as:

- **Flexible Capture** - Capture the whole screen, an active window, or any region (area) on the screen that you want.
- **Accents** - Add special accents to highlight your image with things like arrows, mouse pointers, etc.
- **Special Effects** - Border, buttonize, shadow and other effects allow you to enhance the image.
- **Resize** - Automatically resize your image to as small as 10% of the original size and maintain most of the sharpness. This helps you use the image in practical ways and still have a clear image.

Below is an image created from my company's main web page using UltraSnap. The image was scaled down by 50% to fit in the article at a size I wanted. If your e-mail cannot display the image, go to the newsletter index on my web site at www.mde.net/ezine to view it.

You may remember from last month's newsletter, I wrote an article about a free 3-dimensional graphics text generator. My company name was created from my web site's Freebies page using Xara3D. Check it out at www.mde.net/page12.html .

The authors of UltraSnap, MediaChance, have many other useful tools. Take a look at them at http://www.mediachance.com .

PaperPort - Paper Management software

I purchased a PaperPort Strobe scanner several years ago. It was a great little investment and the scanner takes up about one-third the space that your keyboard uses. The best part of getting the scanner was the software that I bought with it titled PaperPort Deluxe. They have just released 8.0. The software is simply excellent. A few features include:

1. The user interface is easy to use and you have the capability to set up file folders and subfolders similar to Microsoft Explorer to file your scanned images. You can choose color schemes to group folders that assist in quick retrieval.
2. Thumbnail images of the folder contents are displayed to assist in retrieval.
3. Each image can be labeled and a powerful search option allows you to retrieve images by keyword easily.
4. Drag and drop your scanned image into Microsoft WORD, EXCEL or to the fax icon and "away you go". The optical character recognition capability is very good for such a low price. I have scanned and created 90-page WORD documents from typed paper copies with over 90% accuracy. Talk about a time saver !!
5. Set up links to pull images into software products of your choice.
6. Additional plug-ins are available to scan business cards into a standard database format.
7. Additional plug-ins are available to scan standard paper forms in that automatically create data elements from selected fields of the form. This is a powerful feature.

Using PaperPort has helped me eliminate a lot of paper and retrieving documents when I need them has never been easier.

TechRepublic.com

I discovered TechRepublic about a year ago. Since then, I have become an advocate for this web site. It is rich with free content in all areas related to technology. You may not agree with every article published by TechRepublic but you cannot deny the value that it offers in free information and their dedication in helping to improve the knowledge base of the IT world for us all. They now have close to 3 million members, one of the largest free membership bases in technology, possibly in any industry. TechRepublic has six main community sections and several weekly newsletters. The six communities include:

- CIO
- IT Manager
- Net Admin
- Developer
- Support
- Consultant

There are also several complimentary newsletters including:

xSP Informer	Disaster Recovery	ERP News Update
CRM News	Update Server Architecture	Wireless Technology
E-Business Monitor	Enterprise Storage Space	Technical Management
Help Desk	IT News Digest	Web Hosting Services
Product Analysis	Gartner's Tech Perspective	Gartner's CIO Hotline
Gartner's IT Debate	E-Commerce Insight	Executive Management
Security Solutions	IT Trainer Digest	Geek Trivia
Linux	Netware	Windows 2000 Server
Windows NT	Microsoft Office Suite	Outlook
Exchange	Windows 95/98	Windows 2000 Professional
Palm Windows	XP	IT Certification Corner
Career Advice	CIO Focus	GIZMO News

As you can see, there is something for anyone that has a technology need. Members include techies, managers, and business executives in every industry. Their search function provides easy access to the information database.
Included are thousands of free articles, downloads, and tips to help you with almost any technical situation that you might have. If that doesn't work, you can post a question and other members will respond providing you free advice or ideas on where you might find an answer to your issue.

Membership is free. Their main web site is located at www.techrepublic.com .

TenStep Project Management Process

The TenStep Project Management Process is a methodology for managing work as a project. TenStep is designed to provide the information necessary to successfully manage projects of all kinds. On many project management sites you are sent to links to order books. On others, you find a professor's notes from a college class. On www.TenStep.com you will find what you need to be a successful Project Manager, including a step-by-step approach - starting with the basics and getting as sophisticated as you need for your particular project.

Much of the TenStep material, including templates, is available to read for free. Licenses are also available for companies, consultants and instructors. The TenStep website contains a substantial, and growing, amount of original project management and related white papers in the **Library for Licensed Users**. In addition, the site contains a separate library called **ConsultantStep!**, which contains actual project deliverables and examples. Last, but equally valuable, a related website called **SupportStep** is coming soon (July 2002), which will focus on the IT application support organization.

Within TenStep, you will love the following features for your organization.

- You can receive a CD with all the content from the TenStep *Internet* website, which can be used as the starting point for your own project management *Intranet* portal. Once installed on your Intranet, you can customize TenStep to add your own company standards, policies and processes.
- Training should be a key component of your deployment. TenStep has a set of ten training modules that can be used as your starting point. The material includes PowerPoint slides, exercises, a major case study and instructor's notes.
- You can signup for a free weekly project management email with helpful reminders and tips. You can sign up individually or include every member of your staff in this circulation.
- TenStep has a great document that describes how to implement project management methodology as an organizational change initiative. It looks at the deployment in a holistic manner and not just a training issue. This is just one of the vast collection of white papers in the Download Library for Licensed Users.

TenStep's basic philosophy is "large methodology for large projects, small methodology for small projects". In addition, this overall approach is right in line with the flexible, scalable ("light") philosophy most organizations are looking to implement.

MDE Newsletter readers **receive a 10% discount** by keying in "MDE100" in the Priority Code when requesting a license.

TenStep products are available at http://www.tenstep.com .

Make Your Site Sell (generating web site traffic)

You can have the most professional web site in the world but it makes absolutely no difference if you can't get people to visit it and take action when they are there. It doesn't matter if you are giving things away or selling an item for thousands of dollars. No traffic means no exposure.

I left my corporate CIO role in November, 2000 after twenty years of managing technology resources. It was a difficult decision because of the security you have in working for a company. Well, we all see with recent high profile companies like Enron, Arthur Andersen, and Worldcom that working for a "stable company" isn't always a certainty. Bottom line is that anything can happen and often does.

I experienced a similar situation many years ago so in 2000 I decided to create my own business and to take charge of my own destiny. My goal was to build an Internet based company that would compliment my new IT consulting business. I had experimented enough with Internet buying and selling to know that the potential to create a viable business was there. I convinced myself that the only way to prove it for myself would be to make the leap so I would have the time to devote to my own business development pursuits. As a CIO, I just didn't have the energy or time to devote to my own pursuits; it keeps you very busy.

Initially, my efforts were focused to providing traditional IT consulting services to pay the bills. The difference was that I also spent nights, weekends, and every spare moment in researching to determine what my Internet business should be. One late night, a light literally went off in my head. It was so clear that I couldn't believe I hadn't thought of it before. The answer for me was to develop information that would help other IT managers improve their management skills, something that I had always taken a great of pride in doing and something that I think I know quite a bit about. It was January, 2001 when I literally modified my business plan strategy to focus most of my attention to management development versus providing only my consulting services.

Enough with the background. I may share more of the story later, but let's talk about a product I discovered that has helped me, **Make Your Site Sell (MYSS)**. When I pursue a new venture, I research the topic diligently until I can perform the venture well. I'm not the quickest to adapt to change but I often recognize when change is needed and consequently make the investment to position myself to make the change.

With my earliest web site development efforts, it was obvious that I had to learn how to create awareness of the web site and interest for someone to visit it. There are hundreds of books, articles, and presentations on the subject. I've read a lot of them in my quest to learn about building a viable Internet business.

About the time I was making my life changing decision, I stumbled across a product named **Make Your Site Sell (MYSS)**. It was another "eye opener". I had always known that the challenge for my new business would be the marketing and sales aspect. The marketing material for MYSS and another product, **Make Your Knowledge Sell**, in Ken Evoy's series of products seemed to be the perfect fit to help me with my new business focus. I purchased both and I'm glad I did.

MYSS gave me some great ideas early on that I immediately implemented. Many of these tips have helped create a foundation for my business and to help increase sales from my web sites. More importantly, the information gave me badly needed insight into the realm of marketing and conducting business online. As a CIO, I have always been a proponent of taking advantage of other people's insight who have already done something that I'm trying to learn about. That's also why I wrote the IT Manager Development Series, , , to give IT managers a "short cut" by sharing my experiences of what works and what doesn't.

MYSS had a lot of practical material with step by step instruction on what to do to achieve increased traffic to your web site. They also offered free material that I downloaded first to take a closer look before buying anything from them. All materials surpassed my expectations and helped me establish a framework to my business that continues to drive traffic and to help me sell my work. I refer back to the manual often and always find something that helps.

The insight I gained has also given me information that I have shared with many other companies who are trying to increase awareness of their company's products and services. Just this month, I shared one of the principles with six other business owners that I learned about in MYSS that drives focused traffic to my web site. When they hear about it, their eyes literally "light up" every time. This one principle is already making a tangible difference for me and I have only been using it since June 6 of this year. I read about it in MYSS last year but it didn't really hit me as to what it was until I went back and reviewed the MYSS book in late May of this year. Like I said, I may not be the quickest but I am definitely persistent.

Believe me when I say that the information in MYSS and the links included to literally hundreds of other resources that can help every stage of promoting and/or selling from a web site is worth every penny. One of the principles Ken Evoy uses is to "over deliver". He does it every time and it's a principle that I have tried to incorporate in my own business.

Learn more about **Make Your Site Sell**, go to the web site at http://myss.sitesell.com/infosales3.html to learn more or download a free trial of the 2002 Make your Site Sell document.

Make Your Knowledge Sell

Last month, I discussed a product titled **Make Your Site Sell**. Ken Evoy, the writer of this excellent book on how to generate traffic to your web site and how to sell from it has written several other books that are of high quality as well. One of them is **Make Your Knowledge Sell**. This is a book that I bought when I decided to begin writing articles and books for my **IT Manager Development Series**. It's an excellent tutorial and begins with the premise that there is a book in each and every one of us.

If you have ever thought of writing a pamphlet, a "how to" guide, a reference book, or a report on virtually any topic that you want to sell, you should take a look at this book. It is written in a step by step approach that gives many examples and makes every part of the process very simple. In actuality, most things are simple after you have learned how to do it. Remember learning how to ride a bicycle? I haven't ridden one in twenty years but know that I could very easily. Writing is somewhat similar, especially when you see how Ken breaks it down into simple steps.

I wrote a series of three articles for the IT Consultant Community of TechRepublic a few months ago that made the case for consultants to add additional revenue to their company by developing information they have and selling it via the Internet to a much bigger audience than what they are able to reach by one-on-one consulting projects.

I have taken this concept to a significant level by writing ten books and more than 70 articles in the last year. Prior to that time, I had written only one article in the early 1980's and would have never considered myself a writer. I still don't , really. But the fact is that my work is achieving positive feedback from readers all over the world. The knowledge that I gained and the Internet has helped me reach considerable numbers of IT managers that I would never have been able to reach in my traditional consulting role or as a CIO.

What you know is valuable to others, even if it is how to enjoy camping with your kids. Go to http://myks.sitesell.com/infosales3.html for more information on **Make Your Knowledge Sell**.

bCentral's ListBuilder

I began using bCentral's List Builder in mid-June of this year. It has been an excellent service and has helped improve my productivity quite a bit.

Before adopting List Builder, I maintained my newsletter email list myself. When a newsletter request came in, I manually sent the person a Welcome email that told them a bit about my newsletter and about MDE Enterprises. Then, I would copy the email address onto a WORD document that I used to maintain my list. When I got ready to send out my newsletter every month, I had to break the list into groups of about 100 or so in order to process through my email server. Bottom line is that it was very labor intensive and just a pain in the neck trying to do it all myself.

Enter List Builder. Now, I have links on my web pages for people to sign up for my free newsletter and to download free tools from my IT Manager ToolKit. ListBuilder handles everything once the link is selected by an interested party. Plus, I get a lot more with the service.

A few features of List Builder that are very helpful for my Internet business include:

- **Automatic collection** of newsletter subscriber email addresses
- **Automatic responder** email sent to all new subscribers.
- **Flexible and user defined information** is collected and saved for demographic statistics. This feature helps me know where my newsletter subscribers came from, what level of responsibility they have, how they found me, and more.
- HTML email creation capability allows me to send emails with graphics and more professional fonts.
- **Open email statistics** tells me how many emails that were sent were opened.
- **Links selected statistics** tells me which links were selected and how often. This is a very good tool to help me understand the dynamics of what my readers are interested in looking at.
- Unsubscribe capability is handled totally by List Builder - I don't have to touch a thing !!

Since I have migrated to List Builder, my productivity has definitely increased and the additional statistical information is giving me much better insight into my subscriber base.

For more information about List builder services, go to http://www.bcentral.com .

Overture 'Pay per Click' Search Engine Service

Anyone with a web site knows that generating traffic to the site is key. You can have the best web site in the world but without people visiting it, it simply doesn't matter. In June of this year, I was about to conduct a mass mail campaign to try to generate new awareness of my IT Manager Development Series. The plan was to develop a postcard and send it to a mailing list at a cost of about $500 per thousand mailings. If you figure a good response rate on mass mail to be 3%, that would generate 30 visits to my web site for every thousand postcards sent out. The final cost calculates out to be over $15.00 per web site visit.

Enter Overture.com !

Overture allows you to bid on key words to list your web page url at the top of a search. An example might be that someone searches on the key word "IT manager" using Yahoo.com. If I have placed a bid on that key word phrase and willing to pay enough for the top position, my web site description and url link will be displayed on Yahoo.com's resulting search page at the top of the list. So far, I haven't spent any money.

When the person clicks onto my url link and actually visits my site, an automatic payment is deducted from my money fund maintained by Overture. I can control how much money I'm willing to spend on a key word, and the total expense I'm willing to incur for the month with Overture. Their setup is very flexible and protects the customer (me).

At this point, I have bids on about 80 key words that I pay for when a visitor goes to my web site from a search. Overture supports several search engines today including MSN, Yahoo!, InfoSpace, Lycos, AltaVista, and Netscape.

The bottom line is that the cost for advertising is significantly less than that for the mass mail example described above. My cost runs around 26 cents per visit. It doesn't get much cheaper than that for targeted traffic that you know is interested in your web site material. Not only is it inexpensive, I know that it produces sales results that more than pay for the service expense.

For more information about Overture, go to www.overture.com .