The ABC's of Assessments - What you Need to Know

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Introduction

There comes a time for every person or organization when outside expertise is imperative to making a quality decision on how to proceed with solving a business issue. During that time, particularly in the Oracle world, it may behoove an individual or organization to hire the services of a vendor who can assess a business issue and make strategic recommendations on how to proceed – in other words, provide assessment services. Very often, you will see an abundance of assessment offerings in the marketplace following major changes such as new releases or a change in platform.

While these offerings are fundamentally marketing tools that position vendors to demonstrate the strength of their resources, individuals and organizations can often benefit from the services provided. This paper explores different assessment options, the strengths and drawbacks of each, and provides common-sense guidelines to ensure an adequate return on each investment is received.

Assessment Types

STRUCTURE

There are two basic ways assessments are structured: pre-built and custom. In a pre-built assessment, the guesswork has been taken out of the equation by defining a specific list of items to be assessed with quantitative answers (e.g. yes/no, 1/2/3, etc.). Often these are conducted by completing fields within forms or spreadsheets, and the answer is then calculated based on the answers given. There is seldom a qualitative component to these assessments. They generally require a low amount of participation from the organization that contracts for them, however the information is limited to what the survey and calculations can provide.

The second type of assessment is a custom assessment, which by its nature is designed for maximum flexibility to suit a variety of business needs. Sometimes these assessments are supported by tools and templates that can reduce the time and investment of gathering information. In addition to quantitative analysis, custom assessments may include the use of qualitative analysis such as interviews with key stakeholders. Qualitative analysis may provide a deeper or wider picture of the situation being assessed.

THE COST

There are some assessment offerings that are free to customers. You may find these tools online at a vendor website or the assessment may include a day or two of consulting whereby a fast analysis is conducted and some pre-built content is leveraged to provide analysis. These are frequently offered when software upgrades are released. However even "free" assessments include some costs, such as the time you spend completing questionnaires, sitting with consultants, and listening to sales pitches.

Most organizations that offer assessments as part of their routine services will have a cost associated with the service. The old adage "you get what you pay for" applies in the case of assessments. The more money you are willing to spend, the greater the depth, breadth and output of an assessment project. Some assessments may even take you as far as a Conference Room Pilot, thereby significantly reducing the time and resources needed to complete a full implementation project.

Essentially, assessments are marketing tools that allow a potential customer to explore their options without fully committing to a direction, whether the direction is in regards to software, technology, or even business processes. Vendors who sell assessment services almost always sell the follow-on services as well. These vendors are looking for a way to offer low-risk options to potential clients that will expose the client to the vendor's people and products. If a vendor has good people and products, this can be a very good way to begin a business relationship.

THE HEALTH CHECK EXPLORED

Health checks are generally pre-built services that look at something specific in the organization, such as the readiness to upgrade, the general health of database services or the review of a specific business process (e.g. Procure-to-Pay). Vendors who offer health checks usually have had a variety of experience with customers and industries and are therefore able to suggest ways for organizations to move to best practices. These services can be valuable in that the investment required from the organization is typically limited in duration.

CUSTOM ASSESSMENTS EXPLORED

Custom Assessment Services are designed to be flexible to suit a variety of business issues. The core backbone of a custom assessment is the process by which a situation is assessed. This would include a period of discovery, followed by a period of

analysis, concluding with presentation of the findings. It is important to look for a vendor that can articulate (in detail) how each of these periods will proceed. What are the recommended durations for each stage? How many people will be required from both the vendor and the organization?

The differentiator between vendors is the resources they bring to bear on the assessment, as the experience of consultants in the Oracle world varies widely. Experts may have specific industry or vertical qualifications that impact their ability to recommend best practices to your organization. Therefore it is a good idea to interview the proposed staff, as experienced consultants will make better use of the time spent with your staff.

The best part of a custom assessment however, is the ability to tailor the output requirements to your specific business needs. For example, one organization may feel that their current state is not fully documented, and so may request that service as a part of an assessment. Another organization may feel that their current state is well-documented and therefore would not need this documentation provided. An organization that knows they will ultimately implement a particular application may want their assessment to include a resource-loaded project plan for the implementation, and may even request that the assessment includes a Conference Room Pilot, whereas an organization looking at a variety of software solutions may only need a Rough Order of Magnitude and a detailed Gap-Fit analysis for one product.

All vendors will be able to provide assessment services that augment your resource pool, bring ideas for success and market a return on your investment. Better vendors will augment your resources with senior staff with a variety of experiences to draw from, will bring knowledge and experience with best-practices for your industry and will deliver a return on your investment.

Ensuring Results and ROI

In theory, ensuring results on your assessment project should not be difficult. Using best practices for vendor selection, project management and risk mitigation are the foundations of success, as they are in many endeavors.

STARTING OUT

1. **Determine your budget**. The more modules and complexity introduced into the assessment, the greater the cost will be for delivery of the findings. The more detailed output you request as part of the services, the greater the cost and duration. Identifying your budget will help to ensure

you prioritize your needs, which is the second step.

2. **When considering where to start, pick something manageable**. Nobody knows your organization like you do so trust your instincts on what your staff (both IT and business) can support. In general, the broader the assessment, the higher-level you will find the results. It may be best to select an initiative that is of less priority if it is more representative of your overall needs. This could give you broader exposure to the strengths and weaknesses of the selected vendor.

3. **Clearly outline what you expect to achieve by conducting the assessment.** Do you need a presentation that will enable you to "sell" a project internally to your senior management? Do you need a project plan and defined costs for an implementation? Specifying your expected outcome from the start will assist you with selecting a vendor who can best provide that outcome.

4. **Understand the costs of the proposed assessment.** How much input and time will be required from your team? What is the duration of each phase of the project? Will the vendor be on site for the full duration? What is the cost of the assessment and what deliverables are provided for that price? What options are available, what are their costs and when do you need to decide whether the options will be contracted?

5. **Ask to see samples of deliverables from past assessments.** This will help you understand exactly what the vendor provides so there are no surprises later. By necessity, these deliverables may not contain useful information, because they will have been cleansed of past customer data, but they will give you an idea of the quality and format of expected deliverables.

6. **Finally, be sure to have a contract in place that clearly identifies the scope of work and the expected deliverables.**

KICKING OFF THE PROJECT

As with any project, following best practices for project management will ensure that your project stays on track and on budget. Ensuring that the project is properly sponsored will guarantee that your resource requirements maintain their spot on top of the priority list. Developing a project charter and project plan will ensure that your team has a collective understanding on where you are going and what it will take to get there. Interim milestones will tell you if your project starts to fall behind, as will a strong risk-mitigation plan.

Even if your assessment is small, attention to these details will

ensure that you don't waste valuable time.

WRAPPING IT UP

When the assessment nears completion, the client should already have a sense of what the findings will include. Nothing in the final report should come as a surprise. However you should be prepared for unexpected findings throughout the process. Especially in very large organizations, it may be difficult for internal staff to pinpoint the cause of the business issue. A past client contracted for a training assessment, and it was determined that the issues were not training-related, but system-performance related. In this case, the client was apprised before completing the requirements gathering phase that there was a lot of negativity about system performance, so when the final report came, they were not shocked.

Ultimately, you will have to perform an assessment of your own. Did the project proceed as planned? Were your goals achieved? Were the deliverables of a high quality? Did you like and respect the resources who were assigned to your project? If the answer to all of these questions is "Yes", then you should certainly consider partnering with the vendor on future endeavors.

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