

CIO International Limited

Creating Business Value

CLIENT PROJECT CASES

We create business value through exploiting world class Information Technology and professional leadership development, partnering for transformation, growth and organizational effectiveness.



PREFACE

Our mission is to achieve business advantage for our clients, challenging established thinking and unlocking insights. We subscribe to the idea that every business is a digital business and that information technology and data quality are key enablers for transformation, growth and organizational effectiveness. We go beyond the consulting and advisory phases to active participation in program delivery that makes the difference.

While we are a relatively new organization having been formed in 2013, we are active serving clients internationally. We are a team of seasoned experienced global practitioners who individually have already completed careers in major world class global organizations.

Interest is high and I am often asked what other things we can accomplish for clients. This brochure provides a flavour of the range and diversity of projects we have accomplished for our clients, as some indication of what we can do for you.

Our key advantage of course is the depth and experience of our global practitioners – people who have been there and done it before.

I trust you will find this enlightening and please feel free to contact me directly if you feel we may be able to add value for your business.



A handwritten signature in black ink that reads "Anthony Foster". The signature is fluid and cursive.

Anthony Foster

Founder & CEO

anthony.foster@ciointernational.com

UNIQUE COMPETITIVE ADVANTAGES

As you read through the cases you will see evidence of what we consider our unique competitive advantages that distinguish CIO International from the competition.

1. One obvious advantage of course is the depth and experience of our global practitioners – people who have been there and done it before. We are all highly experienced in the field and have worked internationally in blue chip global enterprises. We do not assign kids or trainees, like the competition do, who clients end up having to train on the job.
2. Uniquely, ours is a CIO focus and not simply a technology management focus. We offer a complete end-to-end service that delivers business vision, strategies and systems while developing employee competencies to meet the needs of customers. Our competitors focus on technology management. For us, the job is not done until the business value is achieved.
3. Our experience on organizational effectiveness, change management and leadership. We are heavily people and organization centric.
4. Our Business Improvement Process is a unique "Health-Check" tool that helps senior business leaders understand how IT can enable their business in terms they can relate to.
5. We bring an intense focus on data quality management which we have found to be critical for unlocking business advantage.

GLOBAL FOOTPRINT

We are a truly global organization as illustrated by this map showing our international project activities and people locations.



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Interim Management

Our client was undertaking a significant IT enabled Business Transformation and saw value in temporarily strengthening the global CIO function. We established and filled an interim CIO role supported by several key CIO Office positions to interface with the Board and business executives and to drive an aggressive development program.

A rapid transformation was accomplished over two years. Major deliverables were achieved in a timely manner without business disruption and a successor CIO and CIO Office organization were put in place to carry on in a more business as usual environment.

IT Transformation

Our client's internal IT Function was seen by the Chairman as low performing and unfit to handle the company's ambitious growth plans. The IT function was seen as "Order Taker" rather than "Business Technology Partner" that drove innovation and adoption of latest technology.

IT skill sets were found to be lacking in business relationships, strategy and planning, technology management, cyber security and project management. Internal IT operating procedures including asset management were ill defined, lacking in measurement and process rigor. Business executives failed to understand their critical role, tending to dabble in IT technology matters rather than clearly defining business requirements, streamlining business processes and focusing on master data and data quality management.

A radical overhaul was accomplished involving an assessment of the current organization, leading to new internal leadership appointments supplemented by extensive recruitment at the leadership level. A new Operating Model was introduced based on latest standards and industry best practices. Centres of excellence were strategically placed to drive capability development in key areas, operating procedures and performance metrics were instituted along with regular stewardship reporting and reviews at Executive Committee and Business levels.

Recruitment

Our client's major IT Transformation called for a large scale recruitment effort to supplement in-house IT staffing. Some 40 odd positions recruited were senior level executive positions specializing in business relationship, strategic planning, cybersecurity, technology innovation and portfolio management.

New positions were comprehensively defined in terms of roles and accountabilities, key performance metrics, organizational placement, and near term deliverables. A recruitment team was commissioned to scan the marketplace including competitors domestically and internationally. Candidates were interviewed, selected and enticed to join the client organization with competitive compensation packages. Over a one year period the positions were filled and on-boarded. Significant change management and culture development was required to successfully integrate the new staff into the existing organization.

Re-Organization

Our client wished to reorganize their IT function to expand the authority of their central corporate unit into a global IT authority spanning central and international units across the globe.

We introduced an IT operating model comprising one organization, one strategy, one plan, one budget and one set of global operating processes. Governance was accomplished through global processes for the strategic alignment of IT with the Business, value delivery, resource management, proactive management of risks and performance management. Critical areas were gaining clarity on what IT was accountable for versus what the business was accountable for, consistently across the global enterprise, in the face of much local lobbying and differences.

The approach was quickly endorsed and implemented by Executive Leadership who recognized that sensitive and political issues had been well addressed through appropriate engagement and communications with all stakeholders.



TECHNOLOGY & INNOVATION

Centres of Excellence

Our client's IT organization faced critical skill deficiencies in strategic areas. We introduced the Centre of Excellence (CoE) concept to leverage scarce skills, strengthen operational performance and decision accountabilities. Implementation focused on five strategic areas – Strategic Planning, Architecture and Technology Management, Cyber Security, Project Management and Smart Manufacturing.

CoEs were established with senior specialists in the field who set overall strategy, standards, key performance metrics, compliance and assurance programs and managerial oversight of their respective practitioner community across the organization. CoE Heads held delegated authorities for key decisions, practitioner community health, staffing levels, and input to annual performance appraisals.

The CoE concept proved a highly effective and efficient way to tackle scarce technical skills.

Outsourcing

While often considered as mainly a cost reduction exercise, we have found IT Outsourcing benefits less associated with cost reductions and more associated with gaining access to technical skills and enabling internal IT to focus more on business relationship aspects rather than inwards focus on technical operations.

We have conducted outsourcing projects mainly focused on Infrastructure Services such as data centres, network, desktop elements and basic applications maintenance. These are typically multi-year projects with considerable disruption as staff are off-boarded and new operational procedures are introduced typically requiring heavy change management.

More easily managed outsourcing projects involve focused efforts such as discrete project development or specific services such as cloud computing, business process outsourcing or data analytics. These are typically three to six month projects.



WORLD CLASS PERFORMANCE

Asset Management

The client IT organization lacked basic and essential operating procedures built on a robust asset management program. Quality Information was lacking including inventories for applications, contracts, licenses, infrastructures; operational and cybersecurity incidents, and service level attainment. Overall, the client was lacking the fundamentals necessary to run a high performance operation. This represents a critical deficiency which is very easy to identify but labour intensive to correct.

A comprehensive Service Management program was implemented over the course of one year to deliver consistent, repeatable and measurable services through the rigorous application of industry best practices, tools and standards.

It took several more years to achieve operational maturity. Asset management integrity was a by-product from implementing the new procedures and was assisted by using automated tools that scanned and recorded the computing environment.

CyberSecurity

Our client's Executive Committee identified Cyber Security as a major vulnerability requiring attention through the company's Risk Management program. This was supported by internal audit findings and ethical hacking efforts confirming numerous vulnerabilities. The Executive Committee directed that the ad-hoc approach to tackling vulnerabilities be replaced by a rigorous and structured approach based on standards and best practices.

A thorough assessment of cyber security design and operations was completed encompassing web application security, authentication provisions, data loss prevention, denial of service defences, email security, encryption, end point security of devices, identity and access management, intrusion detection, mobility security provisions, network access control, remote access provisions, SIEM (Security Information & Event Management), Threat Intelligence Tooling, and much more.

A comprehensive multiyear remedial program was developed. A Cybersecurity Centre of Excellence was established with specialist staff augmented by external recruitment. In addition, a network of IT security practitioners was installed spanning each business and corporate function to ensure local implementation and tracking. Also, a series of “back to school” workshops was conducted to bring the extended cybersecurity community up to a common level of threat awareness and consistent remedial practices. Awareness and training was also conducted with business staff across the organization with particular attention to those who handled “most confidential” information.

Project Management

The client IT organization had a poor record of IT project success. Assessment quickly identified deficiencies in skills, methodology and influence over Business Executives who would routinely instruct IT to deliver new systems within a prescribed time but without any specifications or active involvement. Further, several hundreds of IT projects were found to be simultaneously underway competing for scarce IT and business resources. Overall, a highly immature approach but easily identifiable.

A Project Management Centre of Excellence (CoE) was introduced to set project management standards and methodology, to police and report on projects underway, to inventory the projects pipeline, to coach project staff as they undertook their work and to intervene when critical issues were identified.

The CoE was mobilized quickly in about three months and became the key enabler in providing transparency on project activity and surfacing performance issues. The Project Management CoE concept has been our single most successful client intervention for early improvements in IT performance.

Architecture & Technology Management

Our client’s IT architecture and technology environments had evolved over the years expanding organically as new elements to the computing environment were added. As a result, the client now had a complex mix of old and new technologies, with overlapping and duplicated capabilities with many elements past their life expectancy and inadequate license coverage.

This resulted in a costly environment with excessive complexity leading to delays in implementing new systems. In addition the overall accountability for architecture and technology management was unclear and diffused across projects that were free to choose their own preferred solutions. This drove a pattern of adopting yesterday’s technologies rather than evaluating and embracing new innovative solutions urgently needed by the business.

Unfortunately, this circumstance is far more commonplace in industry than we would hope to see. In this particular case, our client’s business strategy involved dramatic growth and required IT platforms that were scalable and using latest advanced technology for speed and efficiency. Priority for change was high.

Our approach was to introduce a Centre of Excellence (CoE) staffed with technical specialists who were assigned overall enterprise accountability for future architectures and technology management. The CoE comprised ten to fifteen experienced individuals with the accountability to oversee practitioners across IT and to

sign off on all investment and spend proposals. They exercised influence over the community of practitioners through inputting to annual performance appraisals and staff development.

The CoE relied heavily on purpose specific tools such as Abacus from Avolution for portfolio and architecture management which were used enterprise system wide used by local development teams but within an overall managed framework. The CoE was also very dependent on IT Asset Management systems for intelligence on the legacy environment.

Development was a multi year effort with the CoE and tools established and operating within the first year. By year two the fundamental ways of working had been positively changed with resulting in significant new technology and innovation adoption.

Assurance & Controls

IT business and security controls have typically evolved over the years expanding organically as threats are surfaced, incidents uncovered or new legislation or standards are introduced. As a result most of our clients have a very unclear, complex and confusing control environments inconsistently applied.

Our client had suffered repeat failed audits and the corporate Audit Committee was insistent on both an overhauled controls framework along with compliance monitoring to assure consistent application across both IT and Process Control environments. The project was closely monitored by the Executive Committee.

Effort took two years to conduct focusing firstly on defining baseline controls and enhanced controls for various IT environments including areas of high risk such as internet facing, process control and administration rights environments. Gap analyses were then conducted to identify extensive remedial action programs, which were then implemented and independently assured and signed off.

Our client now has a competitive advantage in its ability to respond quickly and effectively to ever changing security and controls needs.

Cost Reduction

Our client was experiencing an industry down cycle and desperately needed to cut costs. Global IT spend represented a multi-billion US dollar annual expenditure. Urgent intervention was required to reduce costs without harming the business. Focus therefore turned to the identification and elimination of waste.

Spend was inventorised and categorized as investment versus operational run and maintain with reduction targets set for each based primarily on benchmark experience.

Key waste elimination techniques were zero based budgeting, confining IT services to a limited set of standard offerings instead of open ended user choice, consumption based charge out for those service bundles where user can make consumption choices, elimination of low use systems and infrastructure, review of supplier arrangements including reductions to volumes, service levels and rates, insourcing and in some cases outsourcing depending on the market.

Reductions in the order of 15% to 20% were achieved after one year primarily influenced by Executive Committee willingness to endure pain.

Benchmarking

We partner with Aupec Ltd a professional industry benchmarking service. We have conducted high level indicative benchmarks on an industry sector or geographic basis as well as in depth global super major benchmarks in the Energy sector.

The value of benchmarks depends on the quality and availability of client and industry comparison data. Industry comparison data as provided by the likes of Aupec Ltd. is generally satisfactory but we have found client data in many cases to be very inferior. A key challenge is ensuring the content of the data is leading to a like for like comparison.

Benchmark typically focuses on cost but it is also extremely useful in addressing organizational footprint, process and operational maturity as well as IT coverage and penetration. A repeat exercise after two or so years has been extremely useful to chart progress against longer term targets.

Benchmarks are not always a quick affair as defining, gathering and cleaning the information can be a slow process depending on the client. Projects range from three months to one year depending on client circumstances.

Portfolio Management

Our client faced with rapid international project growth needed a faster way to deploy IT. The traditional method of laborious requirements definition, followed by traditional development methods that typically included heavy local customizations meant serious delays and lost business.

A portfolio approach was adopted that simplified the range of IT solutions to a smaller standard set or catalogue of discrete service offerings or “IT Service Bundles” that could be selected and deployed via a menu selection in a standard rapid manner with predictable costs and estimates.

The approach has been well received by the CEO and the IT organization is now seen as more responsive. Further improvement efforts are now being considered to adopt standard IT Industry Portfolio and Architecture tools to further drive standardization as well as facilitate business communications.

Technical Ladder

Our client operates in a country ambitious to diversify to industries requiring higher technical skills and to maximize local employment. In line with this, our client has a large insourced IT organization that has historically been very successful at management development and leadership succession. Unfortunately, technical development was weak and a source of concern for future wellbeing of the organization.

We introduced a system of Functional Discipline management that we have seen successfully deployed in highly technical Engineering organizations. The concept includes role and practices of Chief Engineer for IT, Telecommunications and Data Management. Detailed technical ladders for each discipline were developed with defined competencies and leadership attributes at critical development stages including delegated decision authorities within each discipline’s community.

Implementation involved assessing the current organization and incumbents in each of the discipline communities, identifying existing talents and gaps, recommending Functional Discipline Chief appointments including associated accountabilities, defining key plan deliverables and major milestones. Recommendations have been successfully adopted and implemented.

Globalization

Our client was facing dramatic international business growth beyond domestic borders, and sought wide ranging guidance and consulting on how to establish world class IT operations that would efficiently scale and integrate its international and domestic systems.

All aspects of our IT Operating Model were reviewed including design, best practices for IT governance, business versus IT roles and responsibilities, IT investment decision making, business relationship management, strategic planning, complex project and program management, cost and budget management, key technology and integration platforms, architecture and technology management practices, business controls and cybersecurity, IT and data management for capital projects, process control systems and security, organization structure, skills and footprint.

Following wide ranging reviews, client focus turned to implementation associated with alignment with the business, organization, budget and cost management, reporting, global processes and standards.



ORGANIZATIONAL EFFECTIVENESS

Customer Care Standard

Our client, a major Health Care provider, in response to increased competition, wanted to implement a Customer Care Standard and performance metrics in order to be known as the best medical provider of Emergency Room and Primary Care services to 500,000 employees and their dependents.

A new Customer Care Standard and performance metrics were developed to drive consistent behaviours in customer care. A Committee of senior managers was established to drive alignment and consistency of application. A Customer Service training programme was developed and executed to introduce the standard, including the training of in-house trainers so they in turn could train employees how to work to the standard.

Customer satisfaction of the care services rose significantly following the implementation of the standard and the associated performance measurement.

Competence Development

The Board of a Saudi Utility company, our client, identified the need for a Competence Development program that would ensure all its supervisors have and are able to demonstrate competencies necessary to meet productivity, customer service, cost-effectiveness and workplace safety targets.

An on-the-job training program was developed, spanning five months, in which Supervisors gained skills and the proactive behaviours to better manage their work and their people. The training included Supervisors identifying obstacles to achieving business objectives, taking actions to address these obstacles and thereby enhancing business performance. Progress was monitored and reported monthly to the Board.

A safety culture ensued with supervisors mastering techniques, developing a fit for purpose toolkit for problem solving and decision making, and talking ownership of results reporting to the Board that drove grass roots ownership.

Competency Management

Our client, a major GCC oil company needed to link competencies to all its training programs and streamline to remove overlaps.

Hundreds of training outlines were evaluated and signed off including technical and behavioural competencies for Leaders, Managers, Superintendents, Supervisors, Seniors, Technicians and Administrators across the organization.

A 'Guide to Competencies' for managers was developed and issued which explained the role of competencies in the employee performance and development cycle. Business approval was obtained on the linkage between competencies and each training program. Most competent employees were identified and used to validate the framework and training content. Learning & Development personnel were trained in how to ensure the company's competence model was incorporated into the courses delivered by preferred external training suppliers.

Within 12 months, competencies were incorporated into all training programs delivered at each hierarchical level companywide. Competencies defined as the right technical/functional skills, knowledge and behaviours necessary to do a job successfully. For the first time, the training department used the 'language of the business' and best practice behaviours in all its offerings from internal and external providers.

Business Reengineering

A major international bank decided to maximize (shareholder) value in all areas of its business. The bank's training department with \$100m budget and 550 staff was reengineered to ensure all 75,000 employees possessed the capabilities to deliver value at a lower structural cost whilst delivering an internal customer experience that supported the bank as a premium brand employer.

We were engaged to reengineer the Training Department to ensure it became business driven and founded correct diagnosis of need (delivering training interventions which demonstrated business value creation), top class, fit for purpose, design (which eliminated duplication) and efficiently organised delivery with maximum use of eChannels.

Within one year the Training Department had reduced its budget to \$50m and its staff to 300 whilst delivering a 40% increase in productivity.

Culture Change

Local government in London sought to deliver a consistent service standard in each of its public offices. The Board decided that to be competitive and deliver the highest service standards it needed a new corporate culture. They believed they presided over separate businesses rather than one business using one model understood by all personnel.

We were invited to help them to deliver this culture change. Working in partnership with our client we restructured the entire business and digitized all working processes and systems. Video training was used to clearly identify and cascade consistent behavioral service standards required. A new management dashboard was implemented to cascade the client's strategy so that all employee objectives aligned with the standards.

The result is the consistent application of employee behaviours that align business strategies, processes, systems with individual objectives. Each employee now understands what they are/are not responsible for. Management were trained to keep the business on track.

The corporate culture now determines employee behaviours in all corporate activities.

Corporate University

Our client, the CEO of a major financial institution with 100,000 employees stated *"We can no longer expect to gain sustainable competitive advantage from financial & technological capital alone. The best we can hope for in the long-term is a draw. That leaves only human capital and managerial and leadership leverage for competitive advantage."* The result was the creation an internal university whose purpose was to deliver:

1. Professional development

- Faculties, e.g. for Marketing, Sales and Service etc. to develop employees to deliver business goals;
- Access to top academic institutions and current research.

2. Leadership and management

- Core management development and training for all leaders to world-class standards;
- Building talent for the future.

3. Open personal development

- Open and accessible e-based solution;
- Greater focus on individual choice (that supported career development).

4. Managed learning

- A system to deliver, organise and track learning;
- Individual control over the planning and accessing of learning;
- Reduced costs and improved efficiency through automation and streamlining of training administration .

The corporate university delivered a cultural foundation that met the needs of customers, employees and shareholders. These needs were underscored by a common set of business principles and values that delivered business growth, value based management and productivity goals.

Academy

Our CIO Academy practice was started with training programs scheduled in London UK each September. Client interest however has mainly been for on-site week-long training programs at their home location, usually heavily customized to address local specific issues and usually attended by relevant intact or cross departmental teams. Attendees leave with specific improvement action plans based on learnings and local issues. We provide follow-up support and coaching for attendees to achieve expected outcomes.

Client interest has mainly been in the following modules:

- Business alignment, strategy and planning
- Cost reduction, benchmarking and optimization
- Supplier management and outsourcing
- IT Transformation and performance improvement.

University Business School

An Eastern European university asked us to create a Business School, on their premises, to help government and corporates to deliver Ukraine's 2020 EU Integration Strategy.

Our role is to provide faculty to train leaders how to implement world class business performance and Information Technology that delivers transformation, growth and organisational effectiveness.

In many sectors today people find themselves in leadership roles as a consequence of their technical excellence. They often have little or no effective preparation for the challenges of leadership and EU Integration. Since inception, we have delivered practical, results-focused training and consulting projects that connect individual aspirations to changing business needs. Our goal is to produce confident, competent leaders, managers and employees to improve the performance and sustainability of their organisations.

The Business School opens in 2016.



ABOUT US

We go beyond consulting to partner in transformation, growth and organizational effectiveness, transforming IT organization from Service Delivery and Order Takers to Business Technology Partners.

CIO International Limited is an international IT Consultancy of highly skilled CIOs and IT Technology experts with experience mostly in the Oil and Gas sector. Our Associates come from successful careers in companies like Shell, Exxon, BP, Reliance Industries Limited (India), Imperial Chemical Industries (UK) and Canadian Pacific Limited (Canada). They possess specialist skills in specific practices or industries at Board level, bringing yet deeper expertise to a client engagement. Our connections in India, with the world's largest and most advanced refiner, enable us to supplement our European team with talented Indians at a lower overall cost.

We work with our clients on their premises using a common methodology, collaborative approach and a strong infrastructure of support. Many of our projects and bespoke development programmes become a creative blend of consulting, training and coaching that deliver advanced systems or processes and the right culture, skill set and motivation to gain extremely high levels of sustainable operational performance improvement.

Working with us is easy because we translate Information Technology into business terms, cutting through the hype and the jargon to get to the core issues and opportunities.

OUR CONTACTS

Sarnia House, Le Truchot
St. Peter Port, Guernsey
Channel Islands, GY1 1GR

Admin Tel: +44 7794 246 257
www.ciointernational.com
<https://www.linkedin.com/company/cio-international-limited>