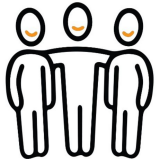"The more people you help become successful the more **successful** you become..."

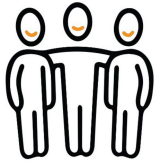# <Client Name> Deep Dive Report

Interim A gro.team

March 201X
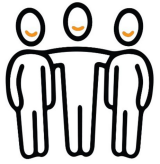
Version 2.0 Redacted

Executive Summary

- This analysis is the result of interviews and interactions with The Client IT team members between March 7th and 9th 201x.

- In my opinion, the issues facing The Client are not atypical of a company coming away from periods of rapid growth and operational turbulence, and the recent additions to the leadership team (particularly Person A and Person B) seemed to have had a very positive effect on company morale and performance.

- The new The Client IT Leadership Team is technically strong, well lead, motivated, business focussed and in Person C has a talented IT Director capable of performing at a higher level.

- Overall the IT team appears to have a good culture and more than its fair share of talented people. There are significant indicators to be optimistic that the team is more than capable of stepping up further and playing an even greater role in driving company growth and success.

- My five key recommendations to maximise the contribution from IT towards <business goal> by 20XX are;
    1. There are currently 300,000 pieces of paper per year coming into the organisation for 150,000 <something>. The current business processes and underlying IT systems need to be redesigned and re-implemented top to bottom.
    2. The planned data room build (≈ £1.6m) should be skipped in favour of spinning up and cutting over to a cloud instance.
    3. The multi Terabyte data set being carried by the IT infrastructure is far, far too large. It should be reduced to a fraction of its' current size by de-duplication, cleansing and SLA based archiving.
    4. Innovation, which currently resides in an <name> should be de-siloed and reintegrated within the company structure.
    5. To be truly "Tech enabled" Technology should be given a C level voice on the The Client board.
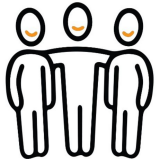
Scaling The Business

- <Place's> current business processes and associated IT systems are creaking at the seams with 150,000 <something> and 300,000 inbound pieces of paper per year.

- To scale to 2,000,000 <something> the business work-flows will need redesigning to be much less manual and paper based.

- The current IT workflow systems (something, something, and something else) will need re-evaluating against the redesigned workflows to make sure they are still fit for purpose and sufficiently scalable.

- The IT Team (Person) have some interesting ideas around the implementation of an <name> system (e.g <name> and <name>) which should be seriously evaluated.

Straight To The Cloud

- A lot of The Client's major IT systems are currently running on old unsupported, single server, operating systems and hardware.

- This represents a material risk in terms of the availability and scalability of The Client's business critical systems.

- Rather than taking a risk-based approach and spending £1.6m building and migrating to an adjacent data room in the warehouse it is recommended that the infrastructure is replaced with an instance in the cloud instead.

- In many ways this is less risky than the planned data room build and upgrade programme as a cloud instance can be built, tested and cutover to separately from, and totally in parallel to, the current infrastructure.

- An adoption of the cloud sooner rather than later will also free the IT Team from the burden of having to worry about hardware, core system availability and scalability, and give it the time and space to re-implement the core company workflow applications.

Risk/Reward

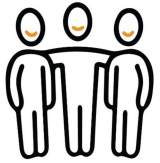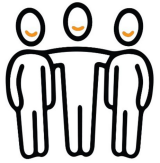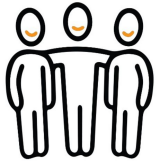|	Risk	Reward
Data Room	• Need to move to new storage system. • New data room can have teething problems. • Doesn't improve infrastructure scalability or flexibility. • Remain on unsupported operating system versions.	• Move on to supported hardware. • Improves resilience. • More consistent with current infrastructure. • Can be executed by end of FYX.
Straight To Cloud	• Running at risk of hardware failure for longer? • The cloud is new to most of the team. • Couples archiving and cloud projects. • Some very old server versions are not supported as is. • Are old app versions runnable in the cloud? • Creates a (variable) opex cost. • Are there any <name> challenges? • Can the IT team successfully execute a cloud migration?	• Creates easy horizontal and vertical infrastructure capacity scaling options. • Improves resilience. • Future proofs the platform. • Improves perimeter security. • Takes away the hardware management challenge. • We won't need to move the systems again. • Aligns on <name's> strategic platform. • Access to new tools and capabilities such as advanced CRM and Big Data approaches. • Creates a variable cost.

Data set

- It is estimated that the size of the data set being stored by The Client systems is >20 Terabytes. For a company with 120 servers this is ridiculously large.

- To put that in context..a Terabyte (TB) is a measure of computer storage capacity that is 2 to the power of 40, or approximately a trillion bytes (that is, a thousand gigabytes). According to futurist Raymond Kurzweil, in The Singularity is Near, the capacity of a human being's functional memory is estimated to be 1.25 Terabytes.

- The size of this data set will be costing significant The Client unnecessary expenditure, will negatively impact back-up and restoration times and make any and all upgrades and migrations riskier.

- This data set should be significantly reduced by a programme of archiving, de-duplication and clean up.
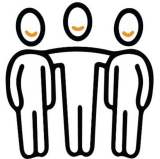
Innovation

- "Innovation" is currently the "responsibility" of the <place> which is separate from the <place> IT Team.

- To really start to leverage all the innovation and disruption happening in the technology and consumer spaces innovation needs to become everyone's responsibility again.

- For example - there are some great ideas around <system> and what an The Client app might look like within the IT Team and this needs to be explored, developed and encouraged.
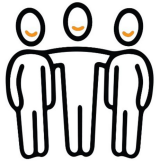
The Voice Of Technology

- To be a truly "Tech enabled" company The Client needs to hear the voice of IT/Technology at the top (board) table.

- If IT is treated like a cost centre then that is how it will behave.

- There are tremendous business opportunities in the home healthcare market at the moment and The Client wants and needs a top-flight IT Team driving the business forward and providing competitive advantage for it.

- Appointing an IT representative to the board will send a clear signal to the organisation that Technology is now considered front and centre to the company.

Top Ten Recommendations To Achieve <business goal>

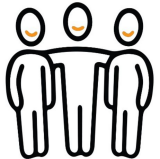|	
1	Redesign and reimplement the business processes and IT systems to be less manual and paper based.
2	Spin up, test, and cut-over to a cloud system *now* to improve platform scalability, flexibility and resilience.
3	Reduce the multi-Terabyte data set which the IT systems have to store. It's unnecessary, and it makes everything slower, more risky and more expensive.
4	Break innovation out of the <name> silo. Innovation needs to pervasive and well connected with the customers (the "What") and IT Team (the "How").
5	If IT is to lead the business and provide competitive advantage for The Client it needs representation at the board level.
6	The <place> based development team should adopt agile development practices. It will lead to significantly more effective product/service execution.
7	Contractor costs need addressing. £200,000 per month is being spent on contract BA and PM resource alone.
8	The IT PMO should have its scope expanded to include the whole of the business. It needs to prioritise, manage and lead change across the whole business - not just within IT.
9	Governance and Security will require higher levels of investment and prioritisation. No one wants to be the next TalkTalk - particularly in the patient records space.
10	The <place> office move is an opportunity to mix up "Business" and "IT" teams. It would lead to better mutual understanding and organisational effectiveness.

Conclusion

Overall The Client is moving in the right direction and is increasingly able to take advantage of the considerable business opportunities in the home healthcare space.

The recent additions to the leadership team (Person A and Person B) have had a very positive impact on morale and performance but there is still considerable operational and technical debt to pay back in order to get to <business goal> by 20XX.

All the problems facing the company are solvable, but I would recommend that the issues highlighted in this report are tackled as soon as possible.
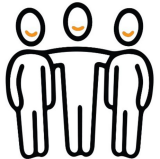
<business goal> by 20XX will require a complete refresh of the company's business processes and technology.

As "friend of The Client" I very much wish the company well and will look for any opportunity to help the company in the future.
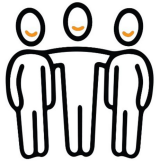
Appendix. 1:1 questions..1

Are you enjoying it here at the moment?	Person Z - yes. Worked with Person F before. Horrific challenges here. Like challenging orthodoxy. Lot better than 11 months ago. Gold standard thing has encouraged perfectionism "not gold standard" in favour of CI. C suite paranoid about risk. Spending money sensibility. Person G - really challenging given past mis management & underinvestment. In adolescent years. Over last 12 months looking back can see progress. Keep the show on the road and fix tactically. Biggest challenge is fixing tactical/strategic balance. PMO helps prioritise. Triaging process. Person L - Software guy..Yes definitely been at pe companies company got sold. Know <system>..been here 4 months. Didn't realise how big the challenge was team is good needs guidance. Developers (6 C#) bank biz systems team ERP payroll etc.
What are your key responsibilities as a team do you think?	Person Z underpin business strategy. Yes we understand it. Want more, want it to be resilient and safe. Business polarised. PTSD after <failed project>. Person G Support the business. Doesn't deliver anything in it's right. Scheduling outage window - weekend Person L - core systems ops and finance are working.
As an IT team, what do we do well do you think?	Person Z - On the cusp of tempering the biz. A couple of JFDIs before. e.g. thing. Hosted in <cloud provider>. Came from Marketing. Cost £30k to do auth. IT is an overhead doesn't have a seat on the board..IT is becoming a trusted partner. Person G - We consistently deliver a service despite challenges and improve it month on month. Management team now in place good. Strategically identify biz reqs and plan in the long term. Was very reactive. IT recognised as business enabler now. Everybody in busting rush..isn't procurement function…departments can buy whatever they want. Person L - get to together to fix problems quickly. No blame culture. Stop problems happening again. Hardware main problem.
What do IT need to get better at?	Person Z - We need to be more pervasive in the business. Architects did some outreach in the field. Process..making jump to large company. Person G - Business plan missing. Biz pulling in different reasons. Person L - processes. We still work in a old fashioned way waterfall dev. Dev managers on agile course agile was a bad word. Team in Haywards Heath use scrum. New dev manager is a scrum master. Next phase to train team up and do it. PMO do spec at the moment. Went to London to look at Dev Ops. People have not had a manager. 1:1s team meeting..skills sets analysis..silos of knowledge..

Appendix. 1:1 questions...2

Does anyone in the team need help to be more successful?	Person Z - Infrastructure side don't embrace new tech. Perception of blame culture "haven't been trained on that".. Person G - Yes I agree. That team plays it safe, staid. Too much policy and process..need controlled innovation. Person L - No teams are sorted out. Cleared out contractors.
How could we get more customer outcome focussed?	Person Z - IT scored badly on "I understand how my job contributes to the business" staff survey. Person G - Need to get more biz aligned. Engage with front line staff. Person L - has taken team to meet other departments to feel their pain. Sobering experience. Could provide quick wins. Want to be more patient focussed.
How could you move faster?	Person Z - Because of the horrors of the past lot of stuff by committee. Slows thing down. Project to go from ERP A to ERP B cost 700k got canned. Big dent in reputation of IT. It would have been a train wreck PM got canned. Person G - ERP A key part of bad feedback. Person L - Knowledge transfer. Biz systems team recruiting. Have more fun. Have training plan.
Would you recommend working here to a friend?	Person Z - I think so. Person G - It depends on their appetite for intensity and lack of structure. Person L - Yes..I have!
What three things would you do if you were CTO?	Person Z - put greater emphasis on biz continuity (none in place), DR, app support teams (under-resourced). Person G - Person J talks about being a "tech enabled business" need to walk the walk. Not joined up..innovation hub hasn't done anything and doesn't have good relationship with IT. They are based in <place> analytics company The Client bought. Skype for Biz white labelled as <thing> Person L - Concentrate on back end systems. We need to enhance core systems. four big company projects 1.

Appendix. 1:1 questions..3

Who are our stars?	Person Z - Me and Person G! Everywhere. People aligned to company agenda. Person G - The people who work in healthcare aren't so money driven. People are more empathetic. That see new The Client with ambition and tangible change. Cynicism around new office..but are moving to new office in Sept/Oct next year. WAN project. Vision 20XX done wonders for morale. Person L - me! People have lot of knowledge key man dependencies e.g <system>.
Anything else we should talk about?	Person Z - Risk averseness hampering us. Need more trust. Person G - big improvement. Huge energy and drive to get better…bodes well. Have faith in the leadership in company. Person L - lack of documentation surprised me. People have good attitude and willing to change existing place lot to fix. Don't really do agile here. Trying to embrace mode 2 stuff..management team went on agile awareness course. Dev Ops?