

# WHY YOU NEED A TECHNICAL REVIEW BOARD

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An effective information technology (IT) policy has long been a crucial component to business success. A wise IT-related decision or investment can provide an organization with critical competitive edge. By the same token, the impact of an unwise decision or a poorly made IT investment goes beyond the dollars that are wasted because ineffective IT solutions result in lost time and can seriously impair efficiency. The bottom line is that organizations need to make IT choices wisely. While there is no “silver bullet” that organizations can deploy to ensure foolproof IT decision making, establishing a Technical Review Board (TRB) can provide a solid foundation for a sound IT decision making policy.

## Introduction to Technical Review Boards (TRB)

A Technical Review Board (TRB) is a committee that ensures the technology choices made by the organization are the best option for all groups and departments. Some TRBs operate inside a corporate IT department and regulate project activities to ensure stability, while other TRBs operate at software vendors to address enhancement requests submitted by application users. In either type of organization, the TRB serves a similar and important purpose.

Although many organizations lack an established TRB or review process, establishing and maintaining a TRB process does not need to be overly complicated. The process is as difficult or as easy as you make it. If your organization does not have a TRB today or if the responsibility of reviewing technical plans rests with a single individual, this article will provide all the information you need to start and maintain a TRB.

## Membership and Picking the Right Representatives

Board membership is one of the most important factors governing the board's effectiveness. The guidelines presented here will help select the right individuals. However, every office and every company has its own culture, policy, and politics. These guidelines will not allow you to please everyone, nor are they a road map for navigating office politics. They do, however, provide you with an objective set of criteria that can be used to help maintain the focus on business issues.

First, stakeholders from high-level management must be included. This may be a CIO, CTO, or IT Director who ultimately has to answer to other executives regarding technology choices made in the organization. Including this individual allows them to provide input at the early stages of a project and influence future direction of technology.

After you ensure that the highest level of management is included, fill the rest of the panel with subject matter experts that can understand the business needs for a project. If there are individuals in the organization who possess useful background knowledge, such as previous experience as a system architect, they may be good choices for a seat on the board. If possible, include a well-informed senior representative from each of the following disciplines or departments:

- Database administration
- System administration (UNIX and/or Windows—whichever is more applicable to your environment)
- Network administration
- Telecommunication administration
- Application server administration
- Project management (if your organization has a dedicated Project Management Office)
- Directory administration (Active Directory, LDAP)
- Internal development (depending on the technology direction, this may be Java or .NET or other expertise)

The TRB should consist of experts from all backgrounds and disciplines. When the top minds from each discipline are assembled one of their key functions should be to try to assemble the person submitting a proposal to the board on how to improve their plans and designs. Any individual that is not ready to educate and help their peers should not be a TRB member. For example, the most outspoken person in the IT organization may be a logical choice since they seem to have all the answers and a desire to influence things beyond their control. However, these individuals sometimes lack the skills to properly debate tough topics and consider the conflicting opinions of others.

## Responsibilities

One of the most important tasks that must be completed when establishing a TRB is to create a charter or mission for the group. It will be just as important to establish those things that will fall under the TRB's purview, as it is to point out what is outside the scope of the TRB.

Overall, the TRB should be focused on judging individual requests for new projects based on objective criteria. Documenting the specific evaluation criteria is not necessary, but the organization will determine the right criteria based on what types of projects are accepted and which are rejected. Importantly, the TRB must realize that they are determining the technology direction for the organization since they ultimately control all new technologies introduced into the environment.

To get started, the TRB must create some documentation templates that request specific information about each project or change to be evaluated. The documentation needs to include the following:

- A clear description of all architecture and infrastructure required (network, servers, databases, directories, etc.)
- A brief business justification for the proposed project or change
- A timeline suggesting when each resource would be needed

This information must be submitted to the TRB a few days ahead of the next meeting via a established submission methodology. For some, this may be sending the information via email to an internal email group that includes all board members, or it may be sent to an executive assistant that distributes the information. Whatever the method, a cutoff time should be published so that the board may sufficiently review the documents prior to the next TRB meeting.

Another important quality that the TRB must project is openness to new ideas. While all proposals should come with some business justification, that justification may not be the result of a request from another business department. For example, the business justification for using Oracle Collaboration Suite may be that it would save money and consolidate several systems into a smaller number of infrastructure servers. The TRB must allow any proposal that meets the submission requirements to be heard and argued at its meetings. The TRB must also be impartial and allow any new idea to be heard even if personal experience or bias has created a negative connotation for that particular technology. For example, "I hate Microsoft products" has no place in a TRB meeting. If such a feeling is something that you cannot set aside for the TRB, then you should excuse yourself from the TRB responsibility.

The TRB members should be mindful of market trends and emerging technologies so that they guide the organization away from technologies that have little future. This type of knowledge is readily available to anyone that practices technology work on a regular basis, but it may not be easy for an IT Manager to stay current. Part of staying current and recommending use of appropriate new technologies is ensuring good company stewardship. That means that while the focus of the TRB is to guide new projects and change requests into appropriate technologies, one must recognize the potential impact on the organization's spending. The TRB should not be primarily concerned with the budgetary effects of a given technology decision. The TRB should balance budgetary considerations with technological advancement and decision-making that is in the company's best interests.

The most important reason TRBs exist is to maintain a stable environment during growth or changes to the existing environment. The board members should be knowledgeable about the existing environment and help the submitter find a suitable technology deployment that leverages existing infrastructure when available. While new technologies will certainly find their way into new projects from time to time, the TRB must apply their experience and market knowledge to determine if the new technology is mature enough to be stable.

## Processes and Where the TRB "Fits In"

### Project Acceptance

In most organizations, projects are initiated by a business need and have a designated business sponsor. Larger projects will usually have a dedicated project manager charged with developing and managing a project plan and all project resources.

The TRB should be involved prior to the start of a project. In fact, the TRB should retain the power to reject a project or to require revisions to projects before they are implemented. By making the TRB a part of the project start requirements, the TRB will immediately have elevated importance and power.

The TRB should not significantly slow down the project approval process. While there will be a little additional time needed in order for the TRB to complete their review process. The review process may result in a revised submission to the TRB which causes the process to start over again.

### Scheduled Meetings


The TRB should have regularly scheduled meetings on a relatively frequent basis—at least twice per month. The meeting schedule should be published and known in advance. If your organization operates in multiple time zones, you should consider rotating the schedule so that it will be easier for remote submitters to adjust their schedules.

### Meeting Agenda

At a meeting of the TRB, the board members have already reviewed the project documentation and will have prepared questions for the submitter. The questions may be related to the technical choices made (product/vendor choices, etc.) or they may focus more on the implementation timeline. The TRB may challenge the business need for a project if it is not specifically requested or sponsored by a particular business department. For example, a project that originates as an internal IT project to consolidate databases may be scrutinized more than a project created to meet a request from the business.

### TRB Submissions

The TRB must require some high-level information about each project it evaluates. Below is an example of what a TRB submission form may include:

	<b>IT CONVERGENCE</b> Support Services	<b>Technical Review Board</b> <b>Request for Project Review and Acceptance</b>
<b>Project Name:</b>	Executive Dashboard	
<b>Technical Project Leader:</b>	Dan Norris	
<b>Project Sponsor (in many cases, non-IT staff):</b>	James Smith	
<b>Technical Resources Required (DBA, Network, Systems, Development, etc.):</b>	DBA (Oracle Applications access), Network/System Administration (install/configure new server), Development (Discoverer report development)	
<b>Project Goal:</b>	Create a dashboard showing key indicators of business health including inventory readiness, raw materials availability, units produced, units shipped, units sold and other business factors.	
<b>Business Justification:</b>	Executive leadership needs to guide the day-to-day operations and make key decisions frequently. The information provided by this new interface will provide them the best and most timely information available to make a well-informed decision.	
<b>Systems Retired Following this Project:</b>	None	
<b>Additional Hardware or Software Required (including estimated costs):</b>	A dedicated server will be required and Oracle Discoverer will be used to create the dashboard reports. This server will also house Oracle Portal which will be implemented as our intranet server at a future date (undetermined).	
<b>Proposed Project Start Date:</b>	01-May-2006	
<b>Proposed Project Duration (assuming requested resources are assigned):</b>	120 work hours covering system installation, application installation and configuration, and development/testing	
<b>Technology Choices (when applicable):</b>	Oracle Discoverer has integration with Oracle Applications and built-in features that make creating dashboard applications easier than competing products. It also integrates with Oracle Application Server and Oracle Portal which will make future transition to those technologies easier.	

<b>Other Technologies Considered:</b>	Cognos, Crystal Reports, Informatica and Business Objects were considered, but not chosen mainly because of the company's standardization on Oracle's products. For our purposes, these products do not offer enough technical differentiators to make them compelling choices.
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Some questions that the TRB may ask during the next TRB meeting include:

- How did you come up with an estimate of 120 hours? How much time from each IT resource will be required?
- How many calendar weeks will this project require to deliver?
- How many other projects will you be working on concurrently including this one?
- Have you considered what configuration choices should be made in order to support the future use of Oracle Portal and Oracle Application Server?
- Will Discoverer integrate with Oracle Single Sign On? Regardless of the answer, why was that choice made?
- Will Discoverer be deployed as a standalone BI Tier installation or will it be a complete installation of Oracle Application Server including an infrastructure tier and a middle tier?
- How will user acceptance testing (UAT) be addressed during this project? What will constitute sufficient testing prior to the production launch of this project?

## Measuring TRB Value

In order to know how much the TRB really helps, you must be able to measure some important metrics prior to TRB creation. The primary metrics that show the TRB's value are environment stability and predictable IT budgeting.

In companies that are growing quickly, the TRB helps fast-paced projects keep a healthy perspective on the other peripheral systems and applications they may impact. The TRB also houses experts that have good industry knowledge and can sometimes assist in identifying alternative approaches to the project. One of those alternatives may result in a lower-cost or more stable solution.

The TRB also provides executive oversight on all IT projects which ensures that no personal agendas govern technology and project selection. IT leadership will value a short meeting where they can learn the high-level information about every new project in a standardized format. The collaboration of all senior-level technologists is also a major benefit to IT leadership since that collaboration will eliminate many of the technical hurdles that projects encounter after they get started.

Without the TRB, projects can sometimes have a huge impact on a system that is not included in the project, but may exchange information with another system that is included in the project.

## Meet the Author

Dan Norris has been an Oracle database consultant for almost 10 years. He has obtained certifications from Oracle (Oracle Certified Master DBA), HP, Sun, Compaq, and Red Hat (RHCE). He is a frequent speaker and presenter at international conferences as well as local and regional user groups.

Dan is a founding board member for the Oracle RAC Special Interest Group (RAC SIG) and an inaugural member of Oracle's Identity Management Customer Advisory Board (CAB). Currently, Dan is a Strategic Consulting Manager at IT Convergence Support Services. He can be reached at [dnorris@itconvergence.com](mailto:dnorris@itconvergence.com).