

Why You Need A TRB

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Why You Need A Technical Review Board

An IT Convergence presentation by Dan Norris

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Agenda

- ▶ Introduction to Technical Review Boards (TRBs)
- ▶ Membership
- ▶ Choosing the Right Representatives
- ▶ Responsibilities
- ▶ Processes and Where the TRB "Fits In"
 - ▶ Project Acceptance
 - ▶ Scheduled Meetings
 - ▶ Meeting Agenda
 - ▶ TRB Submissions
- ▶ Measuring TRB Value

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Introduction to Technical Review Boards

- ▶ Definition: A committee that ensures the technology choices made by the organization are the best option for all groups and departments.
- ▶ Stability and adoption of new technologies are primarily controlled by this team.
- ▶ Equally applicable to corporate IT departments, hosting providers, software vendors, ISVs, and consulting organizations.

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Membership

- ▶ Membership will determine the board's effectiveness
- ▶ Executive or senior management involvement is key
- ▶ Members are picked by senior management, not elected
- ▶ Technical competency is most important

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Choosing The Right Representatives

- ▶ Single representative from each technical area
 - ▶ Database Administration
 - ▶ System Administration
 - ▶ Network Administration
 - ▶ Telecommunication Administration
 - ▶ Application Server Administration
 - ▶ Project Management
 - ▶ Directory Administration
 - ▶ Development

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Choosing The Right Representatives

- ▶ The most qualified individuals are those that have best combination of technical ability and communication skills
- ▶ Ability to accept and discuss constructive criticism is essential
- ▶ Debating conflicting viewpoints will be a common occurrence
- ▶ This is not a "grass roots" group—must have buy-in

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Responsibilities

- ▶ Create a mission statement or charter for the board
- ▶ Set limits on what is within the scope and control of the TRB
- ▶ Create documentation templates to ensure that all submissions receive equal consideration
- ▶ Establish a firm reputation for openness to any project that meets the submission criteria

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Responsibilities (cont.)

- ▶ Board members are expected to keep current on the latest trends and technologies
- ▶ Provide guidance to the presenters on how they can improve their project or proposal instead of simply rejecting it
- ▶ Obviously, save \$\$\$
- ▶ Above all else (even cost savings!!), guide projects to maintain a stable environment

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Responsibilities: Project Acceptance

- ▶ Require TRB approval for all IT-related projects
- ▶ The TRB does not provide design services, but will advise project teams on design issues during review
- ▶ The TRB must not introduce significant delays in project execution



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Responsibilities: Scheduled Meetings

- ▶ Meetings must be on a regular schedule
- ▶ Meet at least twice a month
- ▶ If no new submissions to review, the TRB should have a short meeting to discuss current technology news and events



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Responsibilities: Meeting Agenda

- ▶ Submissions must be reviewed by the board prior to meeting
- ▶ Board members should have prepared questions for project representative
- ▶ Board may debate each project during the "public" meeting, or in private session
- ▶ A majority of the board should be required to approve a project before it can begin implementation

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TRB Submissions

ISS	IT CONVERGENCE Support Services	Technical Review Board Request for Project Review and Acceptance
	Project Name: Technical Project Leader:	Executive Dashboard
	Project Sponsor (Name, e-mail, phone, IT staff):	Chris Jones
	Technical Resources Required (DBA, Network, Systems, Development, etc.):	James Smith
	Project Goals:	DBA (Oracle Application access), Network/System Administration (load balancing, new server), Development (E-commerce report development)
	Business Justification:	Create a dashboard showing key indicators of business health including customer retention, new website availability, sales pipeline, sales shipped, web site and other business factors
	Services Required Following this Project:	None
	Additional Hardware or Software Required (including or download only):	A dedicated server will be required and Oracle E-commerce will be used to create the dashboard reports. The server will also have Oracle Portal which will be implemented as one stream server at a future date (indeterminate)
	Proposed Project Start Date:	01-Sep-2006
	Proposed Project Duration (assuming regular maintenance on schedule):	1.5F week hours covering system installation, application installation and configuration, and development/testing
	Technology Choice (when applicable):	Oracle E-commerce has integration with Oracle Applications and built-in features that make creating dashboard applications easier than competing products. It also integrates with Oracle Application Gateway and Oracle Portal which will make future transitions to these technologies easier
	Other Technologies Considered:	Creating Custom Reports, Business Intelligence and Business Objects were considered, but not chosen mainly because of the ongoing standardization on Oracle's products. For one purpose, these products do not offer enough technical differentiation to make them compelling choices

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Sample TRB Questions

- ▶ What comprises the estimate of 120 hours of effort? How did you arrive at that estimate (past experience, detailed task analysis, etc.)?
- ▶ How many calendar weeks will this project require to deliver?
- ▶ Have you considered the configuration choices necessary to possibly support Oracle Portal or Oracle Single Sign On in the future?
- ▶ Will Discoverer integrate with Oracle Single Sign On? Why (not)?

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Sample TRB Questions

- ▶ Will Discoverer be deployed as a standalone BI Tier, or a full OAS installation?
- ▶ How will User Acceptance Testing (UAT) be conducted? What testing will be sufficient to authorize go-live of production?

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Measuring TRB Value

- ▶ Metrics:
 - ▶ Environment Stability
 - ▶ Controlled IT Spending
 - ▶ Resource Utilization
- ▶ Measure metrics prior to TRB creation
- ▶ Measurements can be based on any criteria deemed appropriate for the organization



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Miscellaneous TRB Tips

- ▶ When starting a TRB, make sure the project plan templates include enough time to navigate the TRB process
- ▶ Do not allow projects to bypass the TRB just because there isn't enough time
- ▶ Smaller organizations should consider a similar approval process if they are not large enough to support a TRB

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Case Study: Before TRB


- ▶ Development technologies used: Visual Basic, Java Servlets, EJBs, JSPs, Struts, ASP, XML, SOAP, Oracle Portal
- ▶ Server products used: Oracle Application Server, JServ, IIS
- ▶ Server platforms used: Windows, Linux, AIX
- ▶ Multiple projects all deploying their own hardware and their own Oracle licensing

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Case Study: After TRB

- ▶ Development technologies used: Standardized on Java technologies, open standards (like Web Services and JSR 168 portlets)
- ▶ Server product: Oracle Application Server
- ▶ Server platform: Linux
- ▶ Multiple projects share a single production deployment cluster and cut Oracle licensing costs by sharing hardware
- ▶ New projects either conform to these standards or make a compelling case for changes

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Summary

- ▶ The TRB can have a great "stabilization effect" on fast-growing and agile organizations without slowing down progress
- ▶ Membership in the TRB provides a way to identify leaders within the organization
- ▶ Well functioning TRBs help align business and IT objectives
- ▶ Improved interdepartmental communication is facilitated by TRB creation and frequent meeting schedule

Questions, comments, suggestions?




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