



CIO/CTO Engagement Process



ClearTone Consulting, LLC
Technology Strategy Leadership



CIO/CTO Engagement Process

Congratulations, you have made the decision to engage a fractional or virtual CIO/CTO. You likely arrived at this decision due to significant challenges facing your organization and time sensitive opportunities that will define your future. You may also have concerns about introducing a new personality into the leadership team and you want to ensure all team members have a voice that is heard.

ClearTone Consulting understand these challenges, dynamics, and opportunities. We have created this onboard process to provide you transparency and insight up front. Every organization has unique needs and challenges and therefore the processes documented here provides a framework for the starting point of the engagement. Depending on the specifics of the engagement, certain areas may be removed and others could be added but the high-level principles of engagement will remain.

Time is of the essence to effectively onboard your new leadership partner

ClearTone Consulting LLC Principles of Engagement



Practicing Servant Leadership principles includes:

- Listening
- Empathy
- Awareness
- Persuasion
- Conceptualization
- Foresight

Integrity: Confronting challenges objectively and maintaining accountability

Transparency: Communicating openly and honestly in all business relationships

Inclusion: Supporting an environment in which all individuals are treated fairly and respectfully, have equal access to opportunities and resources, and can contribute fully to the organization's success

Transformation: Seeking opportunities to elevate the business, customers, and team members

ClearTone Consulting LLC Onboarding Engagement

Each engagement has unique parameters that must be considered in order to define the most effective onboarding process, but the following is a general framework in order of priority that serves as a starting point for the engagement. CIO and CTO engagements may be project-specific and narrow in scope while other engagements may be more general in nature. These steps can be appropriately applied to ensure success and minimize onboarding cycles.

1 Leadership Team Relationship Building

The strength, resilience, innovativeness, productivity, and accountability of any organization is a reflection of the leadership team. As countless business books have documented, a highly functional leadership team is paramount to the success of an organization. One of the first tasks for an onboarding CIO is to get to know each leadership team member. Understanding both their personal and business backgrounds as well as their current landscapes, challenges, and opportunities is fundamental to the success of the technology leader and the team relationships.

Understanding the communication style of the team members helps an onboarding CIO engage in future discussions in the most productive manner

Team members may have an analytical, intuitive, functional, or personal communication style and developing this understanding supports clearer communications and fewer miscommunications.

2 Strategic Plan Review or Development

If your organization has completed the work of developing a strategic growth plan for the upcoming year, this document will serve as the primary lens to view all current and potential future projects. It is imperative that an onboarding CIO understand the background, rationale, and expectations outlined in the strategic plan so they can quickly become an effective representative of that plan to the rest of the organization.

If your organization has not completed a strategic growth plan, the CIO can be instrumental in helping support a planning process. Whether it be formal or informal, documentation of the business objectives of the leadership is fundamental to guiding all future decisions facing the CIO role.

3 Customer, Competition and Market Analysis

In parallel to understanding the strategic plan of the organization, gaining an understanding of the customer base, the competition, and the market is fundamental to supporting effective decision making. Your CIO will meet with client account management teams to understand the status and needs of the most important customers. Additionally, appropriate time will be spent to gain an understanding of your organization's competition and other market factors. In many cases a CIO can be instrumental in analyzing competitor's product and service offerings to assess opportunities to compete and differentiate.

4 Organization and Team Relationship Development

During the onboarding period your CIO will gain an understanding of your organizational structure taking note of key internal stakeholders that can help the technology team be successful. Employees are both customers and partners to IT and investments should be made to ensure healthy, cooperative relationships are developed and fostered within the organization.

The morale, structure, and capabilities of the technology team are critical to the success of the organization. The CIO's role is to ensure technical staff are appropriately skilled, process-centric, quality-minded, results-driven, customer-focused, and appropriately resourced to achieve the organization's strategic vision. Appropriate time will be committed to developing relationships throughout the team.

Your CIO is the communication conduit between leadership and team members to ensure full transparency and accountability

5 Situational Analysis and Assessment

Whether your CIO engagement is general in nature or project specific, a thorough review and analysis of all aspects within the engagement scope will occur. Current status, resourcing, skills, challenges, vendor management, toolsets, processes, communications, and expectations will all be assessed. You can expect an executive summary of the assessment as an output to the leadership team early in the engagement including appropriate plan of action and milestones as required.

6 System and Data Assessment

Assessing the quality of data being captured and the toolsets and locations of its storage will help clarify strategies for supporting business needs

Many organizations are challenged by the internal systems utilized to support sales, marketing, and operations. An assessment of the tools in place and a mapping of the data generated and captured is required to effectively formulate future plans. In today's world, timely, accurate, and comprehensive business intelligence is critical to informing a leadership team for effective company management.

7 Security, DR, BCP Assessment

The security of an organization's assets and the resiliency of an organization to withstand environmental factors are paramount to future success. The world of security is the fastest changing environment today and also poses one of the biggest risks to any organization. A thorough assessment of a company's security position is required to ensure adequate protections and processes are in place. Similarly, down time due to security or technology issues can be a significant business disruption. Your CIO will review and ensure adequate Disaster Recovery and Business Continuity Plans are in place at the appropriate level to protect the organization against environmental factors.



In Summary

Engaging a virtual CIO/CTO can be an exciting and energizing factor for your company's future growth. An experienced technology executive brings their entire portfolio of experience with technologies, systems, vendors, organizations, and business processes to bare in support of helping your organization succeed. ClearTone Consulting takes pride in becoming a member of your team and joy in helping you realize your vision. Your engagement will begin with a review of this framework to develop a mutually understood and documented process including deliverables and milestones. The success of your organization is the definition of success for your CIO.



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