

APPOINTING MANAGERS FOR I/S TOOLS

PRACTICE OBJECTIVE

It is recommended that an individual be appointed manager of each acquired significant software tool. The objective of appointing a tool manager is three-fold, as follows:

- Objective 1 – Create a source of competency about how to use the tool.
- Objective 2 – Assign someone accountable to oversee tool usage—without someone accountable. Tools may turn into shelfware.
- Objective 3 – Provide a training ground for future managers.

Managing a tool should involve budgeting, planning, training, and related managerial responsibilities.

PRACTICE WORKBENCH

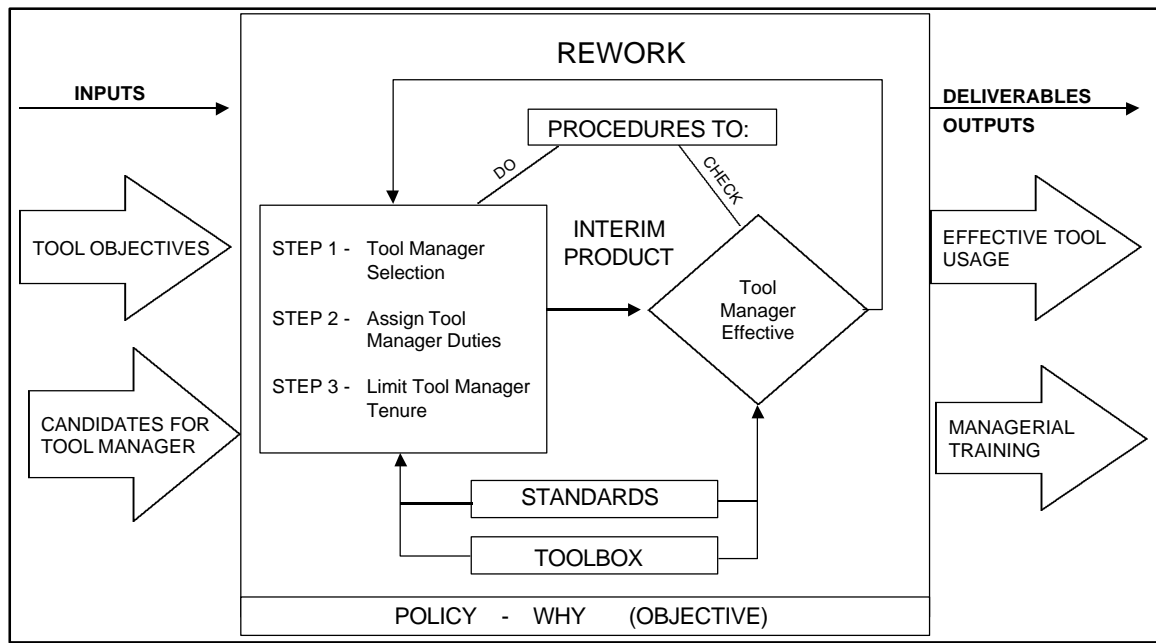
The workbench for managing I/S tools using a tool manager is illustrated in Figure 1. The three steps involves appointing a tool manager; assigning the duties the tool manager will perform; and limiting the tool manager tenure. This concept not only facilitates the use of tools, but builds future managers at the same time.

INPUT PRODUCTS

Once management has determined that a specific tool is needed, and that tool has been selected, a tool manager can be appointed. There are two inputs needed for this workbench. The first is a clear definition of the objective for acquiring and using the tool; second is a list of potential tool manager candidates.

QAI recommends that tool usage be mandatory. In other words, work processes should indicate when to use a specific tool. If a tool user can select among two or more recommended tools that should be indicated in the work process. The tool manager should not be in the mode of marketing a tool, but rather assisting and making tool usage more effective.

Figure 1. Tool Manager's Workbench



IMPLEMENTATION PROCEDURES

A three-step process for using a manager to manage the use of I/S tools follows (use Worksheet 1 to record selection criteria):

Step 1: Tool Manager Selection

Ideally, the tool manager would be selected during the process of selecting the tool. In that way, the tool manager would be involved in selection of the tool, and have ownership in the selection decision.

The tool manager should possess the following skills:

- Organizational;
- Training;
- Tool proficiency; and
- Managerial (planning, organizing, directing, and controlling).

If the tool manager candidate lacks the above skills, they can be developed during the tool manager tenure. If the tool manager position is used to train future managers then technical proficiency and competency in tool usage is the only real skill requirement. The other skills can be developed during the tenure as tool manager. A mentor must be assigned to a tool manager to develop the missing skills.

In addition to the tool manager, an alternate tool manager should also be named for each tool. This individual will not have any direct managerial responsibilities, but will serve as backup for the tool manager. The primary responsibility of the assistant tool manager will be to gain competency in the use of the tool. Normally, the assistant tool manager is a more junior person than the tool manager and someone expected to remain proficient in the tool longer than the tool manager. The assistant is the most logical person to become the next manager for the tool.

Step 2: Assign the Tool Manager Duties

A tool manager can be assigned any or all of the following duties:

- **Assist colleagues in the use of the tool** – The tool manager should be available to assist other staff members in the use of the tool. This is normally done using the concept of a “hotline.” Individuals having problems in using the tool or experiencing operational problems in the use of the tool can call the tool manager for assistance. NOTE: The hours of “hotline” activities may be restricted; for example, 8 to 9 a.m. and 2 to 5 p.m. This restriction will be dependent upon the other responsibilities of the tool manager and the expected frequency of the calls.

- **Tool training** – The initial tool training normally comes from the vendor. However, additional tool training is the responsibility of the tool manager. Note that the tool manager may subcontract this training to the training department, the tool vendor, or other competent people. The tool manager has the responsibility to ensure the training occurs and may or may not do it personally.
- **Tool vendor contact** – The tool manager would be the official contact for the tool vendor. Questions from staff regarding the use of the tool that can only be answered by the vendor should be funneled through the tool manager to the vendor. Likewise, information from the vendor to the company should be directed through the tool manager.
- **Annual tool plan** – The tool manager should develop an annual tool plan complete with planned tool usage, schedule, and resources needed to effectively utilize the tool. Tool managers may want to define penetration goals (i.e., the percent of the department who will use the tool by the end of the planning period); should budget for upgrades, training, and other expenditures involved in tool usage. The tool manager’s time should be budgeted and accounted for.
- **Installing tool upgrades** – As vendors issue new versions of the tool, the tool manager is responsible for ensuring that those upgrades are properly incorporated; that the involved parties are made aware and trained, if necessary. Note again, the tool manager may not have to do a lot of this personally, but is responsible to make sure it happens.
- **Prepare annual tool reports** – At the end of each year, or planning period, the tool manager should prepare for I/S management an overview of the use of the tool during the year. This will require the tool manager to maintain statistics on tool usage, statistics on problems, costs, upgrades, and so forth (note that tool usage can normally be obtained for mainframe tools from job accounting software systems). Non mainframe usage may have to be estimated.
- **Determining timing of tool replacements** – The tool manager, being responsible for a specific software tool, should also be responsible for determining when the tool is no longer effective or when better tools can be acquired to replace it. When these situations occur, the tool manager should prepare proposals to senior I/S management regarding tool replacement.

Step 3: Limiting the Tool Manager's Tenure

It is recommended that an individual serve two years as a manager for a specific tool. The rationale for the two years is that individuals tend to lose interest over a period of time. Also, after a period of time the manager tends to lose perspective of new uses for the tool or deficiencies in the tool. Bringing in a new tool manager every two years tends to revitalize the use of that tool in the organization. Note the tool managers can be transferred to another tool as manager

In instances where tools are highly specialized, very complex, or have minimal usage, it may be desirable to keep an individual manager for longer than a two-year period.

CHECK PROCEDURES

To verify that the practice was performed as specified, the following questions should be answered positively:

1. Has I/S management established objectives for the tool to be managed?
2. Has the use of the tool been specified in I/S work procedures?
3. Has a training program been established for using the tool?
4. Have the potential candidates for tool manager, been trained in the use of the tool which they would manage?
5. Have potential candidates for tool manager, effectively used the tool in a production environment?
6. Do the candidates for tool manager have managerial potential?
7. Does the individual selected as tool manager want to be manager for the tool?
8. Does the candidate selected for tool manager believe that this tool is effective in accomplishing the I/S mission?
9. Will the candidate for manager of this tool have sufficient time to perform the tool manager duties?
10. Have reasonable duties been assigned to the tool manager?

11. Does the tool manager understand and agree that these are reasonable duties to perform?
12. Has a tenor been established on the length of the service for tool managers?

DELIVERABLES

The deliverables from this work practice are important, but subjective in nature. Thus, evaluating the benefits from a tool manager will require the time to perform a subjective analysis. The two subjective deliverables are:

1. More effective tool usage – Having a tool manager is in fact establishing a help desk for tools. Since the tool manager is knowledgeable in what the tool does and how it works, that individual can speed the learning of other users and minimize problems associated with the tool usage. Also, if an individual gets into trouble using the tool, the tool manager is available for assistance.
2. Impart managerial training – The individual appointed tool manager should have total responsibility for that tool. This includes contact with the vendor, budgeting for maintenance and support, overseeing training, and providing supervisory support. It is an effective way to provide managerial training for individuals; it is also effective in evaluating future managerial candidates.

USAGE TIPS

The role of a tool manager can be enhanced by the following:

1. Allow individuals adequate time to perform the tool manager role – The assignment of a tool manager should be a scheduled and budgeted assignment, so that the individual knows the amount of time and resources that can be allocated to the tool manager's assignment.
2. Incorporate tool manager performance into individual performance appraisals – The performance of the tool manager's duties should be considered an important part of an individual's work. Thus, like other tasks it should be included in an individual's performance appraisal.

WORKSHEET 1

Tool Manager Selection Worksheet

Name of Tool:											
Tool Objectives:											
Vendor Name:											
Vendor Contact:											
Potential Tool Managers											
Name		Skills Possessed								Selected	
		Organizational		Training		Tool Proficiency		Managerial			
		Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Tool Manager Duties:											
Duty						Assigned					
						Yes			No		
<ul style="list-style-type: none"> Assist colleagues in the use of the tool Tool training Tool vendor contact Annual tool plan Installing tool upgrades Prepare annual tool reports Determining timing of tool replacements 											
Comments:											