

Certified Transformative Advisor Program

Technology Advisory Syllabus

- I. Section One – WHY Technology Advisory?
- II. Section Two – Discover the Landscape
 1. Evaluate – Comprehensive assessment and guidance
 2. Diagnose – Identify strengths and weaknesses
 3. Engage – Create a Strategic Technology Plan
- III. Section Three – Work the Plan
 1. The Advisor as a Change Leader
 2. The Advisor as a Project Manager
 3. The Advisor as Orchestrator
 - a. Recruiting Experts/Contractors
 - b. Synergizing Contracted and Client Resources
 - c. Measuring and Managing Outcomes
- IV. Section Four – Key Milestones (i.e. Sub-Projects) of Technology Deployment, Usage and Management
 1. Technological Infrastructure
 2. Technology for Managing People
 3. Technology for Managing Process
 4. Operational Systems and Technology
- V. Section Five – Support Clients – Ongoing Evaluation and Systems Maintenance
 1. Systems Support and Maintenance
 2. Folding ongoing Technology Advisory into your advisory services