



Certified Transformative Advisor Program

Technology Advisory

Syllabus

This course equips you to navigate the sometimes intimidating world of technology. It provides the structure to perform a comprehensive technology evaluation, diagnose specific areas in need of attention, and create a Strategic Technology Plan to address them. Gain knowledge, tools and support to guide your clients through technology upgrades and learn to orchestrate internal and external resources. Layout the key milestones of technology deployment, usage and management to optimize your clients ongoing technology management.

Section One – WHY Technology Advisory?

Session 1: WHY build a Technology Advisory Practice; Building Your Business Plan

Section Two – The Advisor’s Role in Their Client’s Technology

1. Evaluate – Comprehensive assessment and guidance
2. Diagnose – Identify strengths and weaknesses
3. Engage – Create a Strategic Technology Plan

Section Three – Work the Plan

4. The Advisor as a Change Leader
5. The Advisor as a Project Manager
6. The Advisor as Orchestrator
 - a. Recruiting Experts/Contractors
 - b. Synergizing Contracted and Client Resources
 - c. Measuring and Managing Outcomes

Section Four – Key Milestones (i.e., Sub-Projects) of Technology Deployment, Usage and Management

7. Technological Infrastructure
8. Technology for Managing People
9. Technology for Managing Process
10. Operational Systems and Technology

2021 Technology Advisory (CTAT)

Cohorts-Mondays 12:00-2:00 PM EASTERN

Study Halls-Thursdays 3:00-4:00 PM EASTERN

Session 1	9/27	12:00-2:00 PM
Session 2	10/4	12:00-2:00 PM
Session 3	10/11	12:00-2:00 PM
Session 4	10/18	12:00-2:00 PM
Session 5	11/1	12:00-2:00 PM
Session 6	11/8	12:00-2:00 PM
Session 7	11/15	12:00-2:00 PM
Session 8	11/29	12:00-2:00 PM
Session 9	12/6	12:00-2:00 PM
Session 10	12/15	12:00-2:00 PM
Optional		
Study Hall	9/30	3:00-4:00 PM
Study Hall	10/7	3:00-4:00 PM
Study Hall	10/14	3:00-4:00 PM
Study Hall	11/4	3:00-4:00 PM
Study Hall	11/11	3:00-4:00 PM
Study Hall	11/18	3:00-4:00 PM
Study Hall	12/2	3:00-4:00 PM
Study Hall	12/9	3:00-4:00 PM