# Consulting Engagements

*(Presented in chronological order of start dates)*

## Design of a Multimedia Training Video
**A small training video company – Houston**
**July-August 2009**

Our client's customer was dissatisfied with an initial video training guide on the subject of Expert Knowledge Capture, but could not convey to the supplier what it wanted changed. We used our own knowledge and short interviews to refocus the deliverable, shortened it by a third, reordered the video clips, and created a new introduction. The result was much more effective and the customer was satisfied, subsequently ordering a shorter version demonstrating a specific technique, which we also helped design.

## Software Roadmap for a Merged Product
**A clinical decision support software company – Atlanta**
**August-September 2009**

This international supplier of a Clinical Decision Support System had never resolved the overlap between three software products resulting from acquisitions. The products had obsolete user inter-faces, and the support workload stifled innovation.

Through an executive workshop, we helped them develop their business priorities about the product. Then we were called to conduct a follow-up exercise to define the new roadmap, which we did by interviewing the three development teams and constructing an objective set of requirements and a converged high-level product architecture.

## Enterprise Tagging Study and Roadmap
**An oilfield services company – Houston**
**September-October and December 2009**

This large company initially asked for an evaluation of "behind-the-firewall" tagging systems in order to select a product or specify the requirements to develop one.

We repositioned the study, in agreement with some concerned stakeholders, to first look for case studies and evidence of benefits. We demonstrated that it was neither judicious to develop new software, nor possible to select a viable stand-alone tool in the current state of the market. We created a roadmap based on developing a taxonomy, and evaluating how Office 2010 and SharePoint 2010 might meet the company's need.

## Technology & Competitive Watch Strategy
**A chemical gases company – Paris, France**
**May 2010, Sep.-Nov. 2010, and April 2011**

We first advised the client on the concept of communities of practice.

Later on, we investigated for them how to use this concept to revive a stalled "active intelligence" program. We identified the dysfunctions and misconceptions that were preventing progress and proposed steps, including the creation of real communities of practice, using better collaboration tools, to enlist the company's experts in the evaluation of technology and business news.

Finally, several months later, we researched collaboration software and delivered a tutorial and supporting materials.

## Architecture-Driven IT Roadmap (1)
**Marketing company – Raleigh, NC and Denver, CO**
**August-September 2010**

This client, having accumulated 170 business requirements through a thorough stakeholder interview process, needed guidance to develop an IT roadmap that would satisfy the requirements. The Enterprise Architect's knowledge of EA frame-works (Zachman, TOGAF) didn't directly lead to a practical course of action. Through an intense series of work sessions (18 work days over a five-week period), we helped the CIO of the company, the business systems manager, and the Enterprise Architect define a complete roadmap with trace-ability from the requirements to the business processes, systems, architecture, and technology.

## Company "Alumni" Group Management
**An Oilfield Services company – Paris**
**March 2011—ongoing**

This client had launched in 2005 a Web site to connect its ex-employees to the company and to each other. Due to the rapid adoption of social and professional networks since then, the strategy of having a private Web site for this purpose was no longer adequate; adoption and interest were falling off. We proposed to switch to a LinkedIn group and put in place strong governance and frequent discussion triggers. Under our guidance, the group grew from 6,000 to 42,000 members in 12 years.

## Enterprise Taxonomy Development
**An Oilfield Services company – Houston**
**July 2011 to July 2012**

We picked up a slow-moving enterprise taxonomy development process at this client. We restruc-tured the taxonomy, expanded it to cover the functions of the company that had not been in-volved, selected a software tool to manage the resulting structure (7000 terms), and resolved alignment issues with an enterprise portal and with SharePoint.

## Recommendations on ERP Adoption
**Universidad Regiomontana (a private university)**
**Monterrey, Mexico**
**November 2011 to February 2012**

This private university, lured by a steep university discount, had started a deployment of SAP's ERP system that was not going well. We assessed the key issues of alignment and communication with the business, lack of understanding of the priority business processes, insufficient resources, service provider competence, etc., and presented recommendations to the CIO and the Board of the university.

## Innovative Conference Facilitation
**Co-sponsors of SPE Intelligent Energy 2012 – Utrecht, Netherlands**
**December 2011 to April 2012**

We used modern collaboration and multimedia technologies to create innovative opening and closing session materials for the audience. This included video interviews of experts prior to the conference, as well as on-site interviews of conference participants, with a team of 8 students acting as video reporters. We also set up and moderated a Wiki for remote participants.

## Algorithm Performance Study
**A Financial Software-as-a-Service Startup**
**January-February 2012 and January 2013**

Our client was unhappy with the performance of a program they were offering to their users. We reviewed the algorithm itself (a complex mathe-matical problem) and documented its theoretical complexity as well as heuristics to reduce the computing time. We also found an error in the software written by a third party.

After using our results to commission some changes, the client came back and asked us to reimplement the software in a different language, solving additional issues in the process.

## Technology "Book of Knowledge"
**An oilfield services company – Houston**
**July-August 2012**

The client wanted to organize knowledge bases concerning specific technology themes on which broadly disseminated experts held the knowledge. They had jumped immediately to the search for a tool. We showed that they needed to define a process and a community-based organization of their experts, and to improve the governance of their research themes. Then, they could then use any number of tools, including some they already had, to facilitate the knowledge crowdsourcing. We proposed a common table of contents for the various "books of knowledge" on each theme.

## Taxonomy Coaching and ECM Strategy
**A health insurance cooperative – Hawaii**
**August 2012—January 2015**

For this client, we provided research and remote coaching of the document management and taxonomy team, including reviews and suggestions about the actual contents of the enterprise taxonomy. We then helped the client develop its Electronic Content Management (CMS) strategy. Toward the end of the project, we also provided advice on potential electronic signature solutions.

## Software Platform Assessment
**An oilfield services company – Houston, Calgary**
**October-November 2012**

This client's fledgling internal software department had a mixed history. One of its internal clients was mistrusting it and was considering buying a competitor's product instead. As part of their decision process, they wanted an independent assessment of the software development process, solution architecture, and the code itself. We formed a team of three experts, performed a broad assessment and made concrete recommendations regarding software process, technical debt reduction, and agile adoption.

## Transformation Working Group Support
**A financial institution – Mexico City**
**February-June 2013**

As part of its IT transformation efforts, aimed at resolving the misalignment between IT and the business, this client formed four working groups to study necessary changes in the areas of IT skills, process, products, and client relationship.

We reviewed the work of these groups, and advised the client to use a much more agile method, deploying incremental changes rapidly instead of conducting long series of meetings that only produced PowerPoint decks, and to make the working group efforts more transparent to the employees in order to elicit feedback.

## IT Architecture and Process Assessment
**A health insurance provider – Ontario, Canada**
**April 2013**

This company wanted to extend its IT systems to its "ecosystem" of providers and customers. They needed to assess whether their complex legacy architecture would be able to "scale out" to this greater scope.

We were part of a team of 3 experts who evaluated the architecture and processes and recommended changes. The deficiencies we pointed out were not readily accepted by the client, but we found a way to report our findings honestly while wording them in an acceptable manner to them.

## Data Visualization Product Research
**The World Trade Organization – Geneva**
**April 2013**

The WTO's statisticians produce country-specific economic assessments containing many graphs and charts, and were unhappy with the quality of the output. We studied and compared options that include stand-alone products, technical document editing packages, software platforms to create ad hoc reports, and the option of outsourcing the production of the charts.

## Media Monitoring Service Selection
**An oilfield services company – Houston**
**July 2013**

This company used multiple suppliers to monitor the news mentioning them or their industry in print, Web, broadcast and social media. This required managing and renewing five separate contracts, and aggregating multiple redundant streams of alerts in order to synthesize the coverage.

We managed the issuance of an RFP and the evaluation of responses to form a recommendation for a streamlined and better integrated set of sources.

## Security in the "Internet of Things"
**A startup security supplier – San Francisco Area**
**September 2013—September 2018**

We initially conducted a short study to advise this stealth-mode startup about the system architectures suitable to manage certain security aspects of a novel product for securing "Internet of Things" devices.

Subsequently, we were retained to provide ongoing advice about the application of their technology to the Oil & Gas industry. We also helped the client expose their solution to potential customers and present to technology consortia.

## Architecture-Driven IT Roadmap (2)
**Mexican Ministry of Education**
**March-April 2014**

We examined the needs for information systems to support the management of student, teacher and school records. We proposed an enterprise architecture, a methodology to create a roadmap of projects, and partially populated the roadmap for the client.

## Architecture-Driven IT Roadmap (3)
**National Institute for Educational Assessment (INEE) – Mexico City, May 2014—March 2018**

This new agency, created as a result of education reforms, needed to develop from scratch a comprehensive set of IT solutions to develop, administer and analyze tests at the national level while meeting strict "transparency" (i.e., anti-corruption) criteria. We developed their architectural approach, studied the requirements of multiple systems, and conducted numerous workshops to develop the solution and information architectures. We also advised several units on knowledge management strategies and the creation of communities of practice.

## Collaboration Requirements Study
**The Statistics Research and Education Center (CIDE) of the Mexican federal government**
**August 2014—July 2015**

As part of a multi-disciplinary team, we recommended state-of-the-art designs and IT systems for their new building in Mexico City to facilitate collaboration.

The study was later extended to advise the CIO on several aspects of his IT roadmap, including the use of massive open online courses (MOOCs) to disseminate the institute's results to the public.

## Energy Domain Consulting
**Object Management Group (OMG) and Industrial Internet Consortium (IIC), May 2015—ongoing**

These two consortia wish to expand their activities in the Oil & Gas sector. We continuously provide insights into the requirements of the industry, report on trends detected at industry conferences, and provide contacts with prospective members, whom we also educate on what the OMG and IIC are offering. Claude Baudoin also serves as co-chair of several task forces and working groups, and cébé retains a courtesy seat as OMG Contributing Member.

## Software Selection for Publication Review and Approval
### An oilfield services company, Dec. 2015-Jan. 2016

We studied the potential solutions, both cloud-based and on-premises, to replace a legacy system used by employees to submit manuscripts to publication and conferences, and by management to review those submissions. The existing system had various shortcomings that often led to approval delays and process violations.

We offered a choice of a fit-for-purpose cloud-based manuscript review system, or a more generic SharePoint-based workflow management system that could be run in-house.

## Strategic Business Development Consulting
### A global system integrator – Asia/US/Canada
### January-July 2017

For this multinational system integrator in growth phase (500 people with a base in India and teams in China, Korea, Canada and the US) we established contacts in the Industrial IoT world and we provided strategic advice on how to position their services, especially in the Oil & Gas industry.

## Knowledge Management Strategy, Taxonomy and Software Selection
### An IoT startup company in Oil & Gas – Houston
### January—May 2019

This company wanted to organize its knowledge and documents early on before getting overwhelmed but a mass of uncategorized information.

We held workshops to determine the requirements, created an enterprise taxonomy, derived from it a document folder structure for short-term improvements, and recommended solutions for content management and CRM.

## IT Job Descriptions and Skills Matrix
### A major financial institution in Mexico
### September 2019—May 2020

As part of its adoption of agile development methods, this bank wanted to create job descriptions and align its staff skills with it.

We researched IT skills matrices and advised the client to simplify what they had created, which had too many positions and was rooted in obsolete distinctions between analysis, design and programming. We added a list of potential sources of training to "upskill" their IT personnel.

## Process Mapping and Analysis
### A Financial Intermediary – Los Angeles
### April 2021—May 2022

We helped this client understand that their processes for lead generation and sales closing contained ambiguities, redundant approval steps, and ill-defined roles and responsibilities. We convinced them to look not only at details of their processes (which we modeled using the BPMN notation) but also at the overall enterprise architecture—strategy, value chain, capabilities, processes and systems, and how they connect.

## Digital Transformation Strategy
### An Oil & Gas service company – Abu Dhabi (United Arab Emirates) and Kazan (Russia)
### June 2021—June 2022

We were recommended by a Board member to advise this client on the creation of a roadmap to extend their services to digital products.

We developed a 360-degree questionnaire, recommended an enterprise architecture framework, built a 3-year roadmap of strategic initiatives, and were subsequently retained to continue to advise the Chief Digital Officer in the execution of the roadmap.

# Executive Reports

### "Enterprise Architecture at 23"
**Cutter Consortium – Arlington, Mass.**
**February 2010**

This 30-page report presents the state and directions of EA and gives CIOs and business executives pragmatic recommendations to apply frameworks such as TOGAF, incorporating business process management, SOA, Master Data Management, and cloud solutions.

### "Business Process Management Glossary"
**Cutter Consortium – Arlington, Mass.**
**June 2010 and April 2013**

Having identified that there was not a high-quality glossary of BPM concepts available, we proposed and delivered a 20-page glossary, first published in 2010, which is being updated and republished in 2013.

### "Social Media and the Enterprise"
**Cutter Consortium – Arlington, Mass.**
**February 2011**

This 31-page report presents scenarios for the adoption of social media in business. It addresses the issues (and the hype over some of these issues) and describes examples of successful usage.

### A Product Architecture Brief
**A networking equipment supplier – San Jose, Calif.**
**April-June 2011**

Preparing for the launch of a software product, the client found that their technical writers could not deliver a strategic architecture white paper for a CIO-level audience. We interviewed product managers and architects and wrote a 26-page paper.

# White Papers

### Artificial Intelligence and OMG Standards
**Object Management Group – Boston, Mass.**
**August 2019**

Redesigned and wrote a 22-page white paper that set the OMG's strategy for AI foundational standards and led to the creation of an AI Platform Task Force a few months later. The paper documents existing efforts (or lack thereof) and contains an initial taxonomy of AI concepts. Claude Baudoin has been co-chair of the Task Force since then.

### Standard Template for Cloud Service Agreements
**Object Management Group – Boston, Mass.**
**December 2022**

This 24-page paper proposes a standard structure for Cloud Service Agreements, enabling cloud customers to compare proposals from multiple providers and to make sure that all important clauses and service levels are specified. The paper may lead to a proposal for a standard after a feedback period in 2023.

# Education and Training

## Knowledge Management Course
**Network for Excellence in Training (NExT) – Calgary, August 2013**

Our KM course is an intense, 4-day event covering all the aspects of knowledge identification, retention and sharing in an organization. It covers such topics as taxonomy, the psychological and institutional barriers to KM, the creation and nurturing of Communities of Practice, and the way social media technology is changing knowledge management.

## Technology Training for Sales
**An IT services company – Mexico City January-April 2014**

This IT services company had been doing traditional "body shopping" services – renting out programmers and project managers to clients. In order to expand into new services, the key account managers needed to be retrained. We performed the requirements study, developed the program, and provided two day-long workshops, one on IT innovation and one on Cloud Computing.

## Technology Education Program for Sales
**A managed services company (MSP) – Mexico City February—August 2014**

This service company was concerned that its account managers did not understand the new kinds of services the company was offering (esp. cloud computing and IT consulting) to effectively sell contracts.

After a series of interviews, we built an education program and delivered a series of six workshops covering subjects such as mobile computing, cloud computing, enterprise architecture, and agile development.

## Social, Mobile, Analytics and the Cloud
**A large bank – Mexico City August 2014**

This half-day workshop was put together to educate key business and IT personnel of the bank on the impact of the "SMAC" technologies (social, mobile, analytics and cloud) on their business. We focused in particular on the new expectations that users have about accessibility and ease of use, the way negative social feedback can impact a business, the risks related to privacy, and the new digital data stream opportunities that a business can leverage.

## Key IT Concepts for non-IT Executives
**A major retail company – Monterrey, Mexico December 2015**

This company's CFO assumed the supervision of the IT group without prior exposure to IT strategy. We constructed a two-day high-intensity interactive course that covered the principles of enterprise architecture, strategic planning, agile project management, enterprise applications, IT sourcing, cloud computing, IT service management, and IT innovation.

## Assessing Cloud Service Agreements
**Texas State Auditor's Office – Austin, Texas August 2020**

We successfully bid on creating and delivering a training workshop to state IT auditors on the complexities of Cloud Service Agreements (CSAs) and how to evaluate whether the state's Department of Information Resources (DIR) was entering into the right contracts with cloud service providers.