



CIO Advisory Services

cogentes

business results first



Vision is about perspective.

When CIOs struggle to see the entire landscape, we help provide that perspective.

CIO Advisory Services

Helping CIO's advance their careers and serve their organizations more effectively.

An alternative perspective

CIOs today are under tremendous pressure. An uncertain economy coupled with high expectations from business partners creates an environment with little margin for error. CIOs have few resources to help them think through and plan for the range of decisions they need to make - until now.

Our CIO Advisory Services are designed to support individual CIOs and make them more effective and successful within their organization. Our services include:

- Merger and acquisition (M&A) due diligence.
- CIO coaching and mentoring
- Outside assessments
- Project augmentation

M&A due diligence

This service is designed to help organizations gain insight, from a technology-function perspective, into a company they might acquire or merge with. This insight helps prepare organizations for challenges they will need to plan for and resolve should the M&A actually go through.

CIO coaching and mentoring

This service provides CIOs with the perspectives, industry knowledge, and industry contacts that can help them be even more successful. This service offers ongoing counsel and insights based on the many years of experience of Cogentes consultants, several of whom have been CIOs for prominent organizations.

Outside assessment

This service offers assessments of projects that may be of particular importance at a point in time. CIOs rarely have peers inside their organizations. When important decisions need to be made, it can be very beneficial to draw on the experiences and perspectives of senior level business-IT staff who have had to make tough decisions before. This service provides a sounding board and another analytical mind to help CIOs think through and define their best possible course of action.

Project augmentation

This service provides CIO-level capabilities to manage a given project, often from start to end. Usually these projects are complex, time-consuming, highly analytical, and require interaction with senior-level business partners.



Cogentes helps CIOs focus on the core values, projects, and processes that will make them even more successful inside their companies.

The Value Proposition

How can these services make you more effective and successful as a CIO?

M&A Due Diligence

When organizations contemplate a merger or acquisition, the technology function is a major consideration. It takes a great deal of time to determine the implications of merging or acquiring different enterprise architectures and creating a plan to do so.

The Cogentes M&A due diligence service substantially improves the likelihood of success by analyzing:

- **Architecture** – will the new architecture integrate smoothly, or with great difficulty and expense, with the existing architecture?
- **Business processes** – are business processes in the new organization well documented and functioning effectively or will they need to be shored up soon after an M&A?
- **Culture** – does the new organization share a similar culture and assumptions about how IT should function and support the business? Will this require substantial re-training or re-hiring?
- **Transparency** – what is the new organization not disclosing that could be crippling once the M&A goes through? What is missing that only a third-party such as Cogentes could find out about?
- **Integration plan** – what should an integration plan look like? How long will it take? What is the plan to integrate people, processes, and technology?
- **True costs** – what are the true costs of the M&A in terms of budget, time, turmoil, staff being de-focused, re-hiring and re-training, and long-term support for disparate technology systems, if any, that cannot be integrated?

CIO coaching & Mentoring

The CIO coaching and mentoring service substantially improves the likelihood of success of emerging CIOs. The old saying is that if you can learn from the mistakes of others, you can avoid repeating them and suffering their consequences. This service helps emerging CIOs draw on the experiences and perspectives of senior Cogentes staff on an ongoing basis. It also helps CIOs build industry contacts to gain even more experience and insights from other CIOs.

Outside assessment

When a major decision needs to be made, most organizations prefer to include expert opinions from industry insiders. The cost of making ill-informed decisions in the dark can be devastating. When it comes to the technology function, there is no more complex and difficult an area to understand, plan for, and achieve success. This service provides technology expert opinion support for those difficult decisions.

Project Augmentation

Major technology projects carry major expenses and risks. To mitigate these risks and achieve the desired business results, organizations often look to outside consulting partners to help them analyze, plan, and implement the project. The Cogentes project augmentation service substantially increases the likelihood of success of strategic projects.



*A second pair of experienced eyes
and ears can make a substantial
difference in the successful
outcome of projects and careers.*

Business Results Orientation

What results can you expect to realize from a CIO Advisory engagement with us?

M&A due diligence:

- Substantially increased likelihood of a successful integration.
- Identification of major issues that have not been revealed to date in the due diligence process and a plan to successfully address those issues.
- An objective, third-party analysis of the complexities, challenges, and risks associated with the M&A.
- The confidence to know that you understand, from a technology-function perspective, the costs, required resources, and timelines associated with the M&A activity.

Outside assessment:

- A thorough analysis of the major components of the decision.
- An assessment of the ramifications of each possible decision path.
- A recommendation for a given path, an implementation plan for that path, and an assessment of the risks, costs, and required resources for that decision path.

Project augmentation

Hands on management of a project, start to finish including:

- Initial project assessment including thorough research and comparison of options against

industry benchmarks.

- A project plan including a budget, timeline, list of required resources, and expected outcomes.
- Ongoing project management and progress updates.
- A successful outcome including knowledge transfer at the end of the project to those who will be responsible for managing it thereafter.

CIO coaching and mentoring:

- An increase in insights into a wide range of issues.
- An increase in approaches and tactics for dealing with different situations.
- An increase in industry contacts.
- An increase in skills and overall capabilities.



Cogentes senior consultants, many former CIOs, have a broad base of experience and contacts. We can help emerging CIOs gain insights, skills, and knowledge.

A Solid Approach

Our CIO Advisory services are based on a rock-solid approach to delivering value.

Our approach for M&A due diligence, Outside assessment, and Project augmentation services

The Cogentes approach for these services includes:

- Discovery - a close analysis of the people, process, and technology associated with the project.
- Synthesis - an objective review of the data gathered, operations model, assumptions, and strategic challenges.
- Findings - a presentation of our findings and analyses.
- Recommendations - clearly defined and phased plans that are practical, realistic, and ready for implementation.

CIO coaching & mentoring approach

For the CIO coaching and mentoring service, our approach is to:

- Define a set of goals for the individual CIO that can be accomplished within a given time-frame, usually several quarters.
- Set up a meeting schedule based on the availability of the CIO and Cogentes consultants that will include in-person meetings, exchange of emails, phone meetings, and online meetings.
- Transfer knowledge, approaches, and industry contacts over time through the meetings.

Service Deliverables

The M&A due diligence, outside assessment, and project augmentation service deliverables include:

- A Microsoft Word document that contains our Discovery, Synthesis, Findings, and Recommendations.
- A PowerPoint document that is used to present the key findings and recommendations of this service.

The CIO coaching and mentoring deliverables include transfer of knowledge, skills, approaches, insights, and industry contacts via email and in-person, phone, and online meetings

About Cogentes

Cogentes is a business and technology consulting firm that helps organizations realize their business strategy by maximizing investments in people, process, and technology, substantially increasing shareholder value.

To learn more about Cogentes, please visit our website at www.cogentes.com or call 866-493-2870.



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