

Steps on the Path to CSIA Certification

So, you joined CSIA with the intent of getting certified. Maybe, you just joined and are looking at how to get started. Or, you've been a member for a while and certification has remained on the backburner. We get it. Looking through the CSIA Best Practices and Benchmark guide can be overwhelming. Where do you start? What's the most effective way to attack it?

Remember the old adage about how to eat an elephant? One bite at a time. Well, that's certainly applicable to the certification process. So, we encourage you to just get started. Keep in mind, the smaller you are the easier it is to change and the more you will benefit. And, following the path to certification will further develop your organization and add more value to your company. To help you along the way, we will discuss positive steps as well as common pitfalls along your journey certification.



Four Common Stumbling Blocks

Before suggesting things that you should do, it seems only right that we share some roadblocks that can thwart your certification efforts. So, you can identify these issues and address them accordingly.

1. Lack of management buy-in – Certification is not a side project. It involves all aspects of your organization. So, support and direction from top management is essential. Ideally, certification should be an objective of your overall strategic plan for stability and growth.
2. Failure of self-assessments – In order to get where you are going, you need to know where you are. So, honest assessments of your current business practices and processes is essential.
3. Not knowing what to do – Once you've assessed a business practice, you can still get stymied about what to do next. In some cases, the best practices guide offers suggestions. Or, you can use the CSIA forums to seek advices from other members.
4. Failure to get past tribal knowledge hurdle – Often, organizations have survived on tribal knowledge ... relying on word-of-mouth on how to get things done. And, it seems easier in the moment to not stop and document the process.

Note that avoiding these common pitfalls doesn't guarantee success. There are many other factors that can derail your efforts. But, facing these common issues head on will increase your chance of success. And, use of available support systems like the CSIA forums can significantly help.

Select the Bus Driver

As mentioned previously, attaining certification is not a one-man job. But, it is certainly a good idea to assign a person to be in charge of the process. A project manager is often a good choice because they are familiar with forming teams, defining requirements, assigning tasks, tracking progress, and overcoming obstacles.

Once the bus driver has been chosen, that person can assemble a small team to help establish the baseline. The team can then expand as necessary to document, improve, and implement practices as necessary.

Study Your Roadmap

Before embarking on your journey, begin by orienting yourself to the certification guide and process itself, so you know what you are getting into. Since the Best Business Practices and Benchmark Guidebook serves as the basis for the audit process, you can consider it the roadmap on your journey. Affectionally referred to as “the Blue Binder”, the guidebook was originally developed in 1995 by CSIA Members. It is basically a “How To Book” for the Systems Integration Business. Over the years, the CSIA members have updated and expanded the guidebook. So, you’ll definitely want to get a copy of the BP&P manual and read it thoroughly. Then, share relevant information with your certification committee and respective parts of your organization.

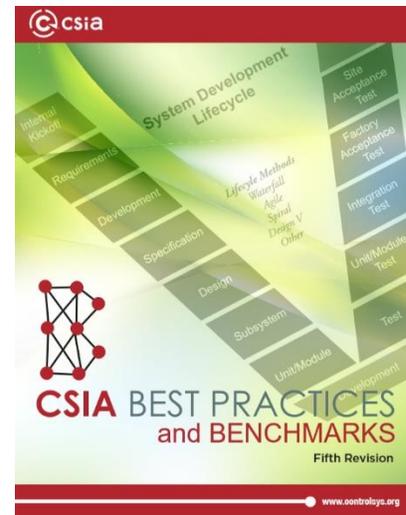


Chart Your Course

In 1999, CSIA selected a subset of the best practices deemed to be the most important business practices to form the basis of the audit. This selection was reviewed not only made by SI members, but vendors and customers as well. CSIA also recognized that the amount of documentation and the extent of the implementation of best practices should increase as companies grow, so CSIA established the required scores based on 3 sizes of companies. And further recognizing that companies need to enhance their practices as they grow, CSIA determined that company should be re-audited every three years to maintain their certification. So, it is definitely wise to get a copy of the Audit Report to better understand what is expected for your company to pass the certification.

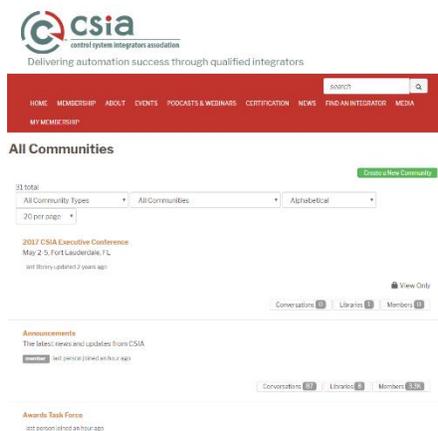
Enjoy the Ride

As you head down the path, your primary mode should be documenting your 'as-is' processes. So, keep it simple and don't get too fancy or over complicate things. You want to capture what you are actually doing, not what you want to do or think you should be doing.

You also don't want to re-invent the wheel, so look at reference materials available through CSIA and other resources (see below). But, avoid blindly adopting third party “procedure manuals”. Remember that the journey is as important as the destination. Really understanding your processes and making sure they are well-adopted are just as valuable.

Additional resources:

- CSIA Connected Community
- Project Management Institute – pmi.org
- Project Connections – projectconnections.com
- The Balance website – thebalance.com
- Society for Human Resource Management – SHRM.org
- OpenSource – OpenSource.com

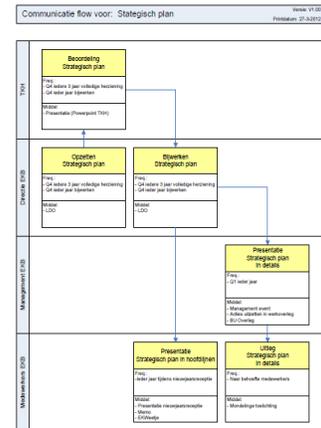


Rules of the Road

To help you get where you are going, you'll need to implement a quality management system with the following elements:

1. Documentation Procedures

First of all, you'll need to establish a framework to work within. Begin by documenting the process that you will use to document your procedures. Then, start by documenting a few highly repetitive tasks and have someone else test them. Make sure that the procedures are consistent with BP&B guidelines. And, be sure that procedures have the necessary specificity. Otherwise, your consistency and repeatability will suffer. Note that companies often start by documenting their project methodology.

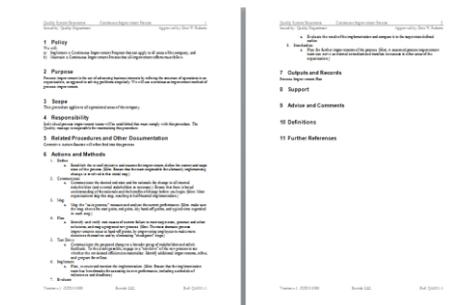


2. Policy Implementation

When implementing or changing any policies, recognize that you are asking employees to modify their behavior. So, you'll need mechanisms to ensure that policies are communicated and understood. Also, recognize that some policies are intended to limit company liability, not just modifying behavior. So, you should have all important policies reviewed by human resources and legal representative. For instance, computer use policies can be particularly sensitive. Ultimately, your employees should review and agree to on all employee related policies. For instance, you can maintain an employee handbook and require that your employees review and acknowledge these policies as part of their annual review process.

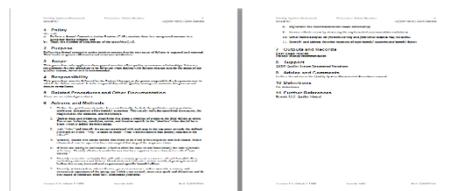
3. Continuous Improvement Process

A continual improvement process is an ongoing effort to improve products, services, or processes. These efforts can seek "incremental" improvement over time or "breakthrough" improvement all at once. Ideally, the processes are constantly evaluated and improved in the light of their efficiency, effectiveness and flexibility. Review your project methodology and establish a process to review and improve it. Be sure to include the processes and the structure themselves. Once the process is established, you can involve more of your company to make improvements throughout your organization.



4. Corrective Action Routine (CAR)

A Corrective Action Routine creates a formal process for your organization to identify and eliminate causes of non-conformities to your processes. Corrective Actions are often initiated due to customer complaint or employee recognition. You can then determine the non-



conformance through a systematic evaluation to analyze the root cause. The corrective action is then implemented recurrence. You can also consider an escalation procedure for added impact. Note that Correct Action Routines are a reactive approach for improvement. For your critical processes, you should maintain more proactive continuous improvement.

Parting Thoughts

The path to CSIA certification can be a daunting, but it is a worthwhile journey. More than just a 'sticker', CSIA certification offers you a chance to benchmark your company against an industry standard. And, more importantly, you can identify and implement the business practices and processes to aid your company's growth. To navigate your way efficiently, consider hiring Exotek as a knowledgeable guide. We collaborated with CSIA to found and develop the CSIA Best Practices and the certification/auditing program. We continue to contribute to the program's development as a core member of the CSIA's Best Practices Committee and the CSIA's Certification Management System Committee. We have brought our experience to help hundreds of CSIA members around the world as they prepare for and obtain their CSIA certification.