

GUIDELINES FOR INFORMATION CLIENTS SHOULD HAVE

Each organization's culture and needs are unique. Guidelines rather than voluminous lists will be more helpful as you can compare these against what you have now. Companies that can account for what is covered in these guidelines should consider their position as sufficiently knowledgeable to maintain their business and negotiate effectively.

1. NEED: THESE ARE THE OCCASIONS WHERE INFORMATION IS REQUIRED

- **Look-ups** – Quick answers to inquiries involving action
- **Tracking** – Trending the data through time intervals
- **Audits** – Establishing validity and benchmarks
- **Analysis** – Data interpreted within a specific context

2. STAKEHOLDERS: THOSE WHO NEED THE INFORMATION IN THE PROCESS

- A. **Technical Titles** – Information relating to operational functions
 - B. **Financial Titles** – Information for cost control, budget forecasting and cost allocation
 - C. **Decision Titles** – Information that assists or supports decision and timing of decision
-
- A. **Technical:** Data that serves operational needs
 - **Trouble Reporting** – Identifiers for repair, restoration, and implementation
 - **Assignment** – Triangulation of data to link location, service, and element (circuit, line, number)
 - **Configuration** – Data sets that describe operating conditions, requirements (QOS, D channels, DLCIs)
 - **Capacity** – Size, quantities, availability, unused volume
 - **Physical** – Equipment, wiring, cabling, environmental
 - **Contacts** – Names, Titles, and contact info for all maintenance – both client and vendor organizations

- B. Financial:** Data that can be linked to cost center codes, budgets, and forecasts
- **Budget Spend** – Overall and by line items, by service and vendor
 - **Contracts** – Summarized analysis, lifecycle dates, commitment criteria
 - **Accounts** – Complete inventory by location, vendor, and service
 - **Catalogs** – Invoices, contracts, bids/proposals, documents
 - **Thresholds** – Normalized and validated accounts with set variance by %, \$
 - **Trending** – Data over specific intervals: monthly, quarterly and year/year
 - **Transactions** – Quantify orders for locations/users/service additions, changes, and deletions
 - **Credits, Refunds, & Disputes** – Log that shows initiated, received, and year end forecast

C. Decision: Information relevant to decisions small and large

- **Reports** – Periodic snapshots that represent overall conditions
- **Summaries** – Counts of items that will serve as reference points for growth/change
- **Analyses** – Specific studies for feasibility, what-if scenarios, and options
- **Red Flags** – Items that can impact operational and/or financial objectives
- **Significant Trends** – Contextual information that must be accounted for in any decision
- **Predominant Rate Factors** – Specific cost elements that have the ability to ‘move the needle’

3. ACCESS: HOW INFORMATION IS SHARED AND CHANGED

- **Centralized** – Single versions, single source data for all to see
- **Portable** – Electronic form that can be accessed from anywhere
- **Updatable** – Easily revised and amended as information changes (real-time)
- **Authorized** – Access is provided by level and user to show some or all



4. ACCURATE & UP-TO-DATE: ESTABLISHING HIGH CONFIDENCE AND TRACKING CHANGES

- **Validated** – At least two sources should agree with data
- **Records Change** – Revisions should be date stamped and initialed
- **Change Control** – Only authorized users allowed to make changes

5. APPLICABILITY: HOW INFORMATION CAN BE USED IN ANALYSIS

- **Context** – Isolated and/or consolidated data
- **Analyzed** – Snapshot in time or trend over time
- **Relevance** – Exception reports or normalized data

6. GRANULARITY: THE SPECIFICITY LEVEL OF DATA TO BE VIEWED, ANALYZED

- **Units** – Anything that can be counted; both fixed and variable units
- **Consumed** – Data of used units over time
- **Space** – Cases where volume of whole is represented – bulk units such as plans

