

SAMPLE CIO 100 2012 AWARD-WINNING APPLICATION: DELOITTE LLP

Editor's Note: For the following sample, we pulled selected key elements and essay-question answers from Deloitte's 2012 award-winning CIO 100 application. While this is not the full application, it is an excellent example of the use of great writing, clear explanations and relevant specific details to assure high scores from our judges.

In the United States, Deloitte LLP and its subsidiaries have 55,000 professionals with a single focus: serving our clients and helping them solve their toughest problems. We work in four key business areas -- audit, financial advisory, tax and consulting -- but our real strength comes from combining the talents of those groups to address clients' needs. Fortune and BusinessWeek consistently rank our organization among the best places to work, which is good news for our talent and our clients alike. When the best people tackle the most compelling challenges, everyone wins.

Describe your project or initiative. Tell us, in bullet points, what it is, what it does and when it was begun. Then briefly describe how it works and its business purpose. Focus your answer on the specific initiative you are submitting for consideration. Please limit your response to 500 words.

- **Workforce Productivity Suite delivered through the Apple iPad**
- **Empowers highly mobile practitioners to be better equipped in the marketplace**
- **Designed and developed, from wireframe to go-live, in twelve months**

EDGEfolio tightly integrates a tablet, desktop and bevy of enterprise systems and external APIs to better inform and connect our highly mobile workforce. The platform supports every dimension of our practitioner's workflow by mashing up internal and external data around travel, client meetings, performance management, sales pipeline, business networking, executive briefs, market intelligence and document management. With a suite of five context-aware, personalized apps, and a customized Microsoft Outlook Add-in, EDGEfolio delivers a consumer-grade enterprise experience to a workforce that needs timely and relevant information at their fingertips.

Are any of the technologies in your project being used for the first time in your organization?

EDGEfolio consists of a .NET infrastructure, 5 native iOS Apps on the iPad and a custom add-in that works inside Microsoft Outlook. The five iPad Apps are: Travel, InCommon, DocBox, Headlines and Portfolio. Operationalizing this infrastructure and user experience required many "first-ever" achievements for Deloitte's Information Technology Services team, including the:

1. First-ever custom designed native iPad app for our enterprise
2. First-ever deployment of an internally designed enterprise App "Store."
3. First-ever mobile information security model, requiring a custom platform assurance infrastructure that enables mobile access to core financial systems

4. First-ever development of a custom Microsoft Outlook Add-In that allows users, and their executive assistants, to manage and curate the EDGEfolio experience from the desktop.
5. First-ever application of geocoding and mash-ups to drive personalization of a mobile app user experience within our enterprise.
6. First-ever application of semantic analytics to identify possible "common ground" between users and potential business contacts leveraging data from Microsoft Outlook and third-party social networks.
7. First-ever integration of RSS feeds with customized search algorithms to deliver a unified view of topics from internal and external sources, including video and text.
8. First-ever deployment of user-controlled synchronization protocols that protects confidential data while affording users the flexibility to view off-line content on a mobile device.

What is innovative about your project or initiative?

The innovation may be based on the use of a new technology or a new way of using existing technology. To begin your answer, choose NO MORE THAN THREE (3) of the most innovative aspects of your project and summarize them in a bulleted list (a sentence or two for each should suffice). Then you may elaborate in as much detail as necessary to explain what makes your project novel. Applications that include evidence to support their claims have a better chance of winning. There is no word limit.

EDGEfolio is innovative in many ways. Here are three significant examples:

1. It is an enterprise-grade mobile platform that supports real-time workflow, but does so, unapologetically, through high fidelity, consumer-grade user interfaces that are dazzling and fun.
2. It is smart and context aware, personalizing the user experience based on employee profiles, client and practice assignments, administrative and financial systems, external APIs and device-native functionality like GPS
3. It required a breakthrough in information security policy and architecture to deliver the real-time performance and financial dashboards on a mobile device.

Here are more specific details on these and other innovative aspects to EDGEfolio.

By knowing, in advance, where they are going, who they are meeting and what market insights they need to have handy, EDGEfolio makes our practitioners better equipped to serve clients. Illustratively, when a practitioners starts their day, they launch EDGEfolio and immediately see where their next meeting is located (relative to where they are standing), whether they can relax because their afternoon flight is already delayed, whether there are any key headlines relevant to their upcoming meeting, whether they have any common points of interest with the people they are about to meet, whether they are tracking behind on their sales goals and therefore need to ignore the account

leads phone call and, most importantly, if they need to grab their umbrella before they leave their hotel room. Moreover, to make any of this possible, Deloitte had to develop a platform-assurance architecture for a newly deployed enterprise App “Store.”.

Beyond technology, EDGEfolio was designed and deployed in an innovative manner. First, it was designed without a formal requirements definition process, usability study and customer focus group, using an intensely iterative and agile design process that involved no wireframes. Designs leaped from verbal narrative to high-fidelity mock-ups in a design process led by a small team (3 FTEs). Secondly, EDGEfolio was Deloitte's first "viral launch," moving into production with no formal announcement. This allowed users within the enterprise to learn about EDGEfolio chiefly by word of mouth, and through internal social media channels. Many users actually "registered" pre-launch on a special count-down page, creating the first internal system that launched with a waiting list. The EDGEfolio has approximately 1,000 users,, including many of our senior leaders.

Please tell us about the management best practice that was most significant to the success of your project. Explain the practice, how you used it and why it was critical.

A few management practices stand out as critical to this project's success.

First, innovation starts with leadership. This project received top-down senior leadership support from two forward-thinking sponsors, including the CIO, which is rare in any organization. Disruptive ideas typically start on the edge and work back to the center, building organic support along the way. In this case, however, despite a conservative culture that does not always value experimentation, EDGEfolio received senior leadership support from these two leaders by creating a "safety zone" in which innovation could rapidly progress. Based mostly on a back-of-the-napkin proposal, they demonstrated the courage to fail, and the vision to invest, which is always the one indispensable ingredient for innovation to occur within an enterprise.

Second, innovation needs a driver. This project was conceptualized by a single Partner, who ultimately re-allocated 50% of his time to drive it forward, serving as chief evangelist, a one-man focus group and lead designer. This project benefited from a rare combination of senior sponsorship and a hands-on user/designer, which streamlined and accelerated the process.

Finally, the most glaring best practice was teamwork. With resources spread across San Francisco, Costa Mesa, Nashville, St. Louis as well as Hyderabad, India and Kiev, Ukraine, the core team was dependent on a distributed support and delivery team that worked together using collaboration tools, like video conferencing, to design and deliver this platform in twelve months, which includes over 200 tables and 70,000 lines of code.

Your Project's Impact

Information in this section will be used to judge the significance and impact of the nominated project.

1. *Which of the following best describes the current status of your project (select one)*

Deployed partially

2. *What is the time frame for the full payoff of the project(select one)?*

12 - 24 months

3. *Please describe the business results generated by the project. Describe the primary objectives of and value derived from the IT investment.*

EDGEfolio makes our client service practitioners better equipped in the marketplace that leads to:

- 1) Increased collaboration
- 2) Productivity gains and
- 3) Strategic advantage.

Quantifying the impact of workflow tools, however, can be challenging, especially since they have been in production only about 100 days. Here are three examples of how EDGEfolio's design and architecture delivers value:

Running between cities and meetings: Deloitte practitioners are among the most mobile workforces in the United States. With the Travel App, our practitioners are always well informed on their schedule, where they are headed next and what they need to know to be prepared once they get to their destination. They get a highly visual travel map stocked with up-to-date flight and gate, train, weather, currency, ground transportation and time zone information curated around their itineraries. While there are many commercially available travel apps, moreover, none deliver this level of integration and personalization. EDGEfolio is fully integrated with our corporate travel agency, a bevy of external APIs and Microsoft Outlook, allowing for the seamless flow of trip data from the reservation center into the iPad. Practitioners do not need to manually plug in the details of their trip, nor bounce between separate apps to find related information. Moreover, this visualization goes beyond airports and hotels and includes locations of client meetings and restaurant reservations, so practitioners have a complete view of every item in their itinerary, saving them time and effort to stay on schedule.

Making better decisions: With a real-time Portfolio App that launches with pre-configured and self-managed dashboards of account's financial and sales performance, practitioners now have ready access to data that can be used and applied at the team-level, enabling for more informed group decisions on sales, client pursuits and account fiscal management. Since this data has been, historically, locked up behind firewalls and passwords that would take 5 - 10 minutes to process, EDGEfolio has changed the game. Financial and performance data is now in their hands in less than ten seconds, with a series of elegant dashboards that can be viewed, printed and "shared" with a team. This has had two meaningful impacts. First, practitioners are now able to make more informed decisions on the go, rather than reviewing account data after making decisions in some cases, a week or month later. Now, there are no barriers to keeping a team fully informed. Secondly, EDGEfolio has not only liberated business data to support decision-making, but changed the relationship our users have with the underlying systems and the incentives to promote compliance with them. These iPad apps are making the underlying systems like SAP more valuable by making their more accessible and therefore extending their utility and useful life.

Building and sustaining relationships: With the Headlines and InCommon Apps,

Deloitte practitioners are substantively better prepared for client meetings. One app provides detailed market intelligence gleaned from thousands of sources on their client, its competitors and sector, while the other app mashes up executives profiles from a user's Outlook schedule along with an analysis of insights on potential "common ground" with each executive to make it easier to "connect" with them. The combination of targeted market intelligence and executive backgrounds and common ground analysis delivered on a mobile device, creates efficiencies and competitive advantage in every client interaction.

Like many large, multinational companies, Deloitte's enterprise data is distributed across many servers and is usually accessible only through firewalls, multiple applications and, in all cases, patience. Rarely, do enterprise systems deliver to their staff a single "digital experience" that mashes up disparate internal and external data stores in a highly personalized and dazzling interface customized to a user's profile and workflow. A typical Deloitte practitioner spends most of his and her time traveling or in meetings interfacing with customers, running between airports, searching for information to make decisions, or share, trying to stay on top of industry and client developments, and looking for presentations to share. Since there were no commercial solutions readily available to meet all of these unique workflow challenges, Deloitte chose to innovate and invest in new technologies that promote collaboration and efficiency, giving us a strategic advantage in the market.

If information is power, then EDGEfolio is, for thousands of our practitioners, power delivered.