

Technical Evaluation Level 5 Role

Overview

This sub-discipline is about the competencies required to perform technical assessment and evaluation of existing and/or new products, services and equipment in order to establish their suitability for on-going use within the organisation or introduction into the organisation. Technical evaluation may be conducted in order to assure levels of service and quality, ensure compliance to standards and regulations or as part of a wider activities associated with the establishment and maintenance of 'fit for purpose' IT/technology supporting an organisation.

Note: For each role it is necessary to subsume the knowledge and understanding statements from the role immediately below.

Performance criteria

You must be able to:

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Competence (7125.01): Design, implement and maintain technical evaluation procedures

This competence will be demonstrated by the following Performance Criteria (7125.01C):

P1 Design, develop, implement and maintain relevant and effective procedures, tools and techniques relevant to technical evaluation activities

P2 Correctly identify all relevant products, services or items of equipment that are subject to a technical evaluation assignment, highlighting potential risks associated with using products, services or items of equipment as part of the operational/production IT/Technology environment that have not been the subject to the process

P3 Correctly identify the objectives, most appropriate approaches to, and issues associated with, any particular technical evaluation assignment

P4 Effectively design and then persuasively negotiate the objectives, assessment criteria,

P5 weightings and values for any particular technical evaluation assignment with all relevant people, sponsors and stakeholders

P6 Set clear and objective assessment criteria for any particular technical evaluation that address all of the business requirements and align with the objectives of service delivery/operations and the service strategy

P7 Source and use the most appropriate technical expertise during technical evaluations, as required to meet the needs of any particular assignment

P8 Provide clear and appropriate advice and guidance to other individuals on the objectives, assessment criteria, weightings and values for any particular technical evaluation assignment

Competence (7125.02): Review and communicate results from technical evaluation activities

This competence will be demonstrated by the following Performance Criteria (7125.02C):

P9 Correctly identify the business, service delivery/operations and service strategy requirements that need to be reflected in evaluation criteria for any particular technical evaluation assignment

P10 Effectively monitor the progress of any particular technical evaluation activity, reporting the results and recommendations from it against business needs, service operation objectives and the service strategy, clearly and in a timely manner to relevant people, stakeholders and other relevant individuals/bodies

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P11 Ensure the full analysis of the performance of any IT/technology product, service and or item of equipment against the assessment criteria and their associated values and weightings is carried out effectively

P12 Correctly identify and critically analyse trends arising from technical evaluations

P13 Critically review the proposed timescales, criteria, weightings and values for any particular technical evaluation assignment put forward by other individuals

P14 Clearly communicate the results of technical evaluations to sponsors, stakeholders and suppliers, negotiating tactfully with those who may demonstrate subjective responses to the results

P15 Critically review and clearly present the quality and effectiveness of any particular technical evaluation assignments, to relevant people, sponsors, stakeholders and other individuals/bodies

Knowledge and understanding

You need to know and understand:

Competent performance requires Knowledge (7125.01K) of how to:

K1 identify and select:

K1.1 the procedures, tools and techniques to conduct technical evaluation activities

K1.2 weightings and values that need to be applied to assessment criteria for any technical evaluation assignment in order to reflect business needs

K1.3 the most appropriate approach to use to conduct technical evaluation activities

K1.4 the objectives for any particular technical evaluation assignment

K1.5 the products, services or items of equipment that are subject to a technical evaluation assignment

K1.6 reliable sources of information and knowledge and references to use in respect of the performance of any particular IT/technology product, service or item of equipment

K1.7 potential external providers of technical evaluation services

K1.8 when and how to use external providers of technical evaluation services

K2 identify:

K2.1 the issues associated with technical evaluation activities

K2.2 the potential risks associated with using products, services or items of equipment as part of the operational/production IT/Technology environment that have not been the subject of a technical evaluation

K2.3 best practice in technical evaluation activities

K2.4 benefits and disadvantages of using external providers of technical evaluation services

K2.5 potential implications of failings in integrity, confidentiality and information security during technical evaluation activities

K2.6 implications of any legislation, regulations and external regulation relevant to technical evaluation activities

K2.7 any implications of internal and external factors on technical evaluation activities

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K2.8 current and future business and service delivery/operations and service strategy requirements that need to be reflected in evaluation criteria for any particular technical evaluation assignment

K3 source, gather and collate:

K3.1 technical expertise from internal and external sources to use during technical evaluation activities

K3.2 appropriate technical criteria for any evaluation assignment against which any particular new or existing product, service or item of equipment needs to be assessed

K4 verify the reliability of sources of information to be used during technical evaluation activities

K5 use and apply:

K5.1 standards and service levels in setting criteria, weightings and values for technical evaluation activities

K5.2 strategy and policies to ensure the alignment of technical evaluation activities with all relevant legislation, regulations and external standards

K5.3 the most appropriate internal/external individuals/groups to conduct technical evaluations

K5.4 the most appropriate technical expertise during technical evaluations

K6 record and store strategy and policies to ensure the alignment of technical evaluation activities with all relevant legislation, regulations and external standards

K7 implement and maintain the procedures, tools and techniques to conduct technical evaluation activities

K8 implement and maintain the procedures, tools and techniques to monitor the quality and effectiveness of:

K8.1 technical evaluation activities

K8.2 new/existing IT/technology products, services and equipment provided by any particular supplier

K8.3 external providers of technical evaluation services implement and maintain the procedures, tools and techniques to monitor the:

K8.4 trends arising from the technical evaluation of related products and/or products arising from any particular supplier

K8.5 alignment of technical evaluation activities with business needs, service operation objectives and service strategy and with any relevant legislation, regulations and external standards

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K9 manage relationships with:

K9.1 external providers of technical evaluation services

K9.2 sponsors and stakeholders during technical evaluation activities

K10 manage the progress of technical evaluations being undertaken

K11 take actions and measures to set assessment criteria:

K11.1 for any particular technical evaluation that address all of the business requirements

K11.2 that align with the objectives of service delivery/operations and the service strategy

K12 take actions and measures to ensure:

K12.1 that technical evaluation activities are informed and directed by the current and future business requirements

K12.2 that the performance of any IT/technology product, service and or item of equipment against the assessment criteria and their associated values and weightings is fully analysed

K12.3 all technical evaluations are conducted fairly, objectively and independently by appropriately skilled personnel with access to appropriate expertise

K13 communicate and liaise:

K13.1 the objectives and purpose of technical evaluation activities to sponsors, stakeholders and other individuals

K13.2 the results of technical evaluations to sponsors, stakeholders and suppliers

K14 advise and guide others on the actions to take as a result of any particular technical evaluation assignment

15 design and develop the procedures, tools and techniques to monitor the quality and

K16 effectiveness of:

K16.1 and conduct, technical evaluation activities

K16.2 new/existing IT/technology products, services and equipment provided by any particular supplier

K16.3 external providers of technical evaluation services

K17 design and develop the procedures, tools and techniques to monitor the:

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K17.1 trends arising from the technical evaluation of related products and/or products arising from any particular supplier

K17.2 the alignment of technical evaluation activities with business needs, service operation objectives and service strategy and with any relevant legislation, regulations and external standards

K18 design and develop the timescales, assessment criteria and their weightings and values, to be used in any technical evaluation assignment

K19 negotiate with:

K19.1 sponsors and stakeholders who may demonstrate subjective responses to the results of technical evaluations

K19.2 suppliers whose products have been the subject of technical evaluation assignments

K20 negotiate the objectives, assessment criteria, weightings and values for any particular

K21 technical evaluation assignment

Competent performance requires Understanding (7125.01U) of:

K22 what is the range:

K22.1 of internal and external factors that could result in the need for technical evaluation of IT/Technology products, services and/or items of equipment

K22.2 of approaches that may be used to conduct technical evaluation activities and their appropriateness in a range of business and organisational contexts

K23 what is best practice in technical evaluation activities

K24 what are the:

K24.1 reasons why a technical evaluation may be required/requested for existing products, services and/or items of equipment

K24.2 weightings and values that need to be applied to assessment criteria in order to reflect business needs

K24.3 reliable sources of information and references to use in respect of the performance of any particular IT/technology product, service or item of equipment

K24.4 implications of any legislation, regulations and external regulation relevant to technical evaluation activities

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K24.5 potential implications of failings in integrity, confidentiality and information security during technical evaluation activities

K25 who are the most appropriate internal/external:

K25.1 individuals/groups to conduct technical evaluations

K25.2 sources of technical expertise to use during technical evaluations

K26 the importance of:

K26.1 setting criteria for any particular technical evaluation that address all of the business requirements

K26.2 assessment criteria aligning with the needs of the business, objectives of service delivery/operations and the service strategy and having clear assessment weightings and values associated with them

K26.3 making clear recommendations, where appropriate, as a result of technical evaluation activities

K26.4 soliciting and using appropriate levels of technical expertise from internal and/or external sources during technical evaluations

K26.5 managing relationships with external providers of technical evaluation services

Competent performance requires Knowledge (7125.02K) of how to:

K27 identify and select the procedures, tools and techniques to monitor trends arising from the technical evaluation of products and/or related products from any particular supplier

K28 identify trends as a result of the technical evaluation of related/similar products and services or those provided by any particular supplier

K29 use and apply the procedures, tools and techniques to monitor trends arising from the

K30 technical evaluation of related products and/or products from any particular supplier

K31 monitor:

K31.1 the progress and the results of any particular technical evaluation against the assessment criteria

K31.2 the quality and effectiveness of technical evaluation activities

K31.3 the alignment of technical evaluation activities with business needs, service operation objectives and the service strategy and with any relevant legislation, regulations and external standards

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K31.4 compliance with all relevant and applicable legislation, regulations and standards relating to technology evaluation activities

K32 report:

K32.1 any trends found during technical evaluation in any IT/technology products, services or items of equipment

K32.2 the results and recommendations from any particular technical evaluation assignment

K33 analyse and interpret trends discovered as a result of technical evaluations

K34 review:

K34.1 results from technical evaluation assignments

K34.2 the quality and effectiveness of any particular technical evaluation assignments

K34.3 the progress of technical evaluations against timescales and objectives

K34.4 proposed timescales, criteria, weightings and values for any particular technical evaluation assignment

K34.5 the risks associated with using products, services or items of equipment as part of the operational/production IT/Technology environment that have not been the subject of a technical evaluation

K35 present the quality and effectiveness of technical evaluation activities

K36 recommend:

K36.1 which products, services and items of equipment are to be the subject of technical evaluations

K36.2 actions and decisions as a result of technical evaluation assignments

Competent performance requires Understanding (7125.02U) of:

K37 what trends may be identified as a result of the technical evaluation of related/similar products and services or those provided by any particular supplier

K38 what are the internal and/or external benchmarks that may be appropriate to use in any particular technical evaluation

K39 the importance of:

K39.1 documenting and communicating the objectives, purpose and results of technical evaluation

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activities clearly to sponsors, stakeholders and other individuals

K39.2 taking references from reliable sources where appropriate/possible in respect of the performance of any particular IT/technology product, service or item of equipment

K39.3 identifying trends as a result of technical evaluations on products, services and/or items of equipment

K39.4 supplying the results of technical evaluations activities into supplier management and/or procurement activities, where appropriate

K40 the need for monitoring of:

K40.1 the alignment of technical evaluation activities with business needs, service operation objectives and service strategy and with any relevant legislation, regulations and external standards

K40.2 trends arising from the technical evaluation of related/similar products and services or those provided by any particular supplier

K40.3 the quality and effectiveness of external providers of technical evaluation activities K41 the procedures, tools and techniques that can be used to monitor the:

K41.1 quality and effectiveness of external providers of technical evaluation services

K41.2 alignment of technical evaluation activities with business needs, service operation objectives and service strategy and with any relevant legislation, regulations and external standards

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