“It is a great time to be a CIO. IT, as a discipline, has emerged to being a business weapon. Never before has this role been as important inside businesses. You shift the thinking from being a cost center, and you are a party responsible for driving and enabling the company’s business strategy. The opportunities are endless.”

– Trevor Schulze, CIO and VP of IT at Micron Technology,
IT Strategy

Background

Our IT Strategy Development Framework will advise and guide you and your team on the very important journey of defining the gaps between today and tomorrow in terms that business leadership will understand.

Our framework evolved over 20 years of pragmatic IT leadership experience working with IT organization of all sizes.

It is simple; we offer a practical approach to CIO’s and IT leaders to use as your own with the request that you respectfully acknowledge the source when presenting externally.

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Enjoy, Mary Patry 2019

Cause or reason for which something is done, achieved
My Inspiration

1. “Why” do we do what we do?
2. “How” will we take action?
3. “What” services and solutions do we provide?
KNOW YOUR WHY

When your **WHY** is big enough, the **HOW** is easy.
Strategy: A plan of action or policy designed to achieve a major or overall aim

Business Strategy and Imperatives

IT Strategy & Imperatives
Strategic Imperatives / Roadmap

Building the Plan

Assess External Environment

Understand Business Demand

Determine IT Direction

Determine Required Actions

Develop Roadmap

Industry Technology Trends

Business Strategy & Imperatives*

IT Imperatives*

IT Programs

IT Roadmap

- **Awareness** of the possibilities - how technology is being used in your industry
- **Reflections** on current trends and future capabilities
- **Focus** on leading indicators

- **What** the business needs to do to execute its strategy
- **What** are the implications to IT’s current state
- **What** does IT need to build to deliver the future

- **What** IT needs to do to align IT imperatives to business imperatives
- **What** does IT need to build to deliver business requirements on time

- **How** will IT deliver on its imperatives
- **How** will IT deliver capabilities to support current and future requirements

- **When** - sequencing of programs based on:
  - Business priority
  - Funding
  - Dependencies

* **Imperative**: an essential or urgent thing.
Getting Started

1. Assess the current state of IT
2. Design the target state of IT
3. Communicate
Where Do We Start?

The Plan

1. Assess the current state of IT
   
   1a. CIO Business Vision
   1b. Assess current state business perspective
   1c. Assess current state IT capabilities
   1d. Assess current IT support capabilities
   1e. SWOT analysis
   1f. PESTLE analysis

2. Design the target state of IT
   
   2a. Design future state
   2b. IT Vision/Mission
   2c. IT principles
   2d. Adjust IT support model as needed
   2e. High level goals/ imperatives
   2f. Goals/Imperatives
   2g. Assess risks and dependencies
   2h. Build high level strategic roadmap

3. Communicate the IT Strategy
   
   3a. Execute strategy risk assessment
   3b. Create communication plan
   3c. Prepare annual refresh plan for the IT strategy
   3d. Execute strategy
Acknowledge Your Focus

Where is your focus?

Build to it.
# Understand the External Current State

## P.E.S.T.L.E. Assessment

<table>
<thead>
<tr>
<th>Political</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Will a change in government (at any level) affect your organization?</td>
<td>• How are your costs changing (moving off-shore, fluctuations in markets, etc.)?</td>
</tr>
<tr>
<td>• Do inter-government or trade relations affect you?</td>
<td>• Do currency fluctuations have an effect on your business?</td>
</tr>
<tr>
<td>• Are there shareholder needs or demands that must be considered?</td>
<td>• Can you attract and pay for top-quality talent (e.g. desirable location, reasonable cost of living, changes to insurance requirements)?</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Social</th>
<th>Technological</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the demographics of your customers and/or employees?</td>
<td>• Do you require constant technology upgrades (faster network, new hardware, etc.)?</td>
</tr>
<tr>
<td>• What are the attitudes of your customers and/or staff (do they require social media, collaboration, transparency of costs, etc.)?</td>
<td>• What is the appetite for innovation within your industry/business?</td>
</tr>
<tr>
<td>• What is the general lifecycle of an employee (i.e. is there high turnover)?</td>
<td>• Are there demands for increasing data storage, quality, BI, etc.?</td>
</tr>
<tr>
<td>• Is there a market of qualified staff?</td>
<td>• Are you looking at cloud technologies?</td>
</tr>
<tr>
<td>• Is your business seasonal?</td>
<td>• What is the stance on bring your own device?</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Legal</th>
<th>Environmental</th>
</tr>
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<tbody>
<tr>
<td>• Are there changes to trade laws?</td>
<td>• Is there a push towards being environmentally friendly?</td>
</tr>
<tr>
<td>• Are there changes to regulatory requirements (e.g. data storage policies or privacy policies)?</td>
<td>• Does the weather have any effect on your business (e.g. hurricanes, flooding, etc.)?</td>
</tr>
</tbody>
</table>
Understand IT’s Internal Current State

S.W.O.T. Assessment

**HELPFUL** to achieving the objective

**HARMFUL** to achieving the objective

<table>
<thead>
<tr>
<th>INTERNAL origin attributes of the organization</th>
<th><strong>HELPFUL</strong></th>
<th><strong>HARMFUL</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths</strong> (Internal)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Weaknesses</strong> (External)</td>
<td>-</td>
<td>-</td>
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<tr>
<th>EXTERNAL origin attributes of the organization</th>
<th><strong>HELPFUL</strong></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Opportunities</strong> (Internal)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Threats</strong> (External)</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
Gather Business Insights

Know the business

Only 16% of organizations are stakeholders who are satisfied with IT.

CIO Business Vision Survey*

Ensure decisions are based on real data by systematically collecting insights from your key business stakeholders.

- Highlight the business impact of IT constraints
- Prioritize key services and create an improvement roadmap
- Build action plans to manage critical stakeholders

*Diagnostic licensed from Info-Tech Research Group

The conversation is key, before during and after.
Assess Current IT Capabilities

Know IT capabilities
Assure clear ownership and accountability for all critical IT Functions.

IT Management and Governance Diagnostic*

Only 35% of organizations are effective across the entire process landscape.

IT Management & Governance Diagnostic will:
• Highlight your organization’s most pressing IT process needs
• Help you prioritize its effectiveness and importance to the business

Each element within the framework provides a comprehensive set of material and tools to help you understand best practices and improve each core IT process.

*Diagnostic licensed from
Prepare to Measure Progress Year over Year

“If you can’t measure it, you can’t manage it.”

IT needs to be here
- 90-100% Satisfaction
- Transforms the Business
  - Reliable Technology Innovation

IT is here
- 80-90% Satisfaction
- Expands the Business
  - Effective Execution on Business Projects, Strategic Use of Analytics, and Customer Technology

- 70-80% Satisfaction
- Optimizes the Business
  - Effective Fulfillment of Work Orders, Functional Business Applications, and Reliable Data Quality

- 60-70% Satisfaction
- Supports the Business
  - Reliable Infrastructure and IT Service Desk

- <60% Satisfaction
- Struggles to Support
  - Inability to Provide Reliable Business Services

Model courtesy of Info-Tech Research Group
Design the Future State

Start with a Clear Vision

- **Specific**
  - What capabilities are needed 1 year, 3 years, 5 years from now?
  - What things need to be discontinued?

- **Passion**
  - What is it that gets your team, your leadership, and your business jazzed up?

- **Opportunities**
  - What innovative opportunities are you leaving on the table?

- **Measurable Results**
  - How will you measure the roadmap?

- **Clear Time Frame**
  - When will you start, when will you finish? What are the risks?
What is a mission statement?

A good mission statement is a useful tool for a well-run business. It’s the “why” of your organization - it is why you exist. A mission statement is present based

**A mission statement defines a company in three key ways:**

1. It defines **WHAT** the organization does for its customers.
2. It defines **WHAT** the organization is to its employees.
3. It defines **WHAT** the organization does for its key stakeholders.
4. It is **WHO** we are.

What is a vision statement?

The term “vision statement” refers to an explanation, usually in written form, of what a person or business wants to be or get done at some later point in time.

A vision statement identifies goals, which provides direction to activities and motivates people to move forward.

- It is the what we will be when.
IT Guiding Principles Example

How will you behave?

1. **Alignment**: Our IT decisions will align with the business’ strategic plan.
2. **Resources**: We will allocate company cyberinfrastructure resources based on how they provide the greatest value and benefit to our user community.
3. **User Focus**: User needs will be a key component in all IT decisions.
4. **Collaboration**: We will work within and across organizational structures to meet strategic goals and identify opportunities for innovation and improvement.
5. **Transparency**: We will be transparent in our decision-making and resource use.
6. **Innovation**: We will value innovative and creative thinking.
7. **Data Stewardship**: We will provide a secure but accessible data environment.
8. **IT Knowledge and Skills**: We will value technology skills development for the IT community.

Example of IT Guiding Principles
What Services Are Needed?

Aligning the business strategy to the IT strategy and imperatives

Business Strategy and Imperatives

IT Strategy & Imperatives

Right Technologies
Right Processes
Right People
Right Capabilities
Keeping IT Real

Building the Roadmap

Strategic Goals

1.  
2.  
3.  
4.  
5.  
6.  

Horizon 1

Horizon 2

Horizon 3

Step capability builds across three - five year horizons
“The first element of change is awareness. You can’t change something unless you know it exists.”

- T. Harv Eker
Communicate

Managing the change

- Prepare
  - Develop change management plans
  - Take action and implement plans

- Manage
  - Identify the gaps
  - Define your change management strategy
  - Prepare your change management team
  - Develop your sponsorship model
  - Collect and analyze feedback
  - Diagnose gaps and manage resistance
  - Implement corrective actions

- Reinforce
  - Celebrate successes

Organizations do not change, people do.
Mary J Patry Bio
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ITEffectivity LLC was founded in 2013 by Mary Patry with the mission of bringing order to the ever-changing world of IT. Her qualifications are based on over 30 years of IT Leadership experience combined with 5 years of consulting and Executive Coaching training. Over the last five years, she has advised and coached over 120 leaders as well as conducted over 15 major team consulting assignments on behalf of Fortune 100 firms to very small non-profits.

Services
- IT Executive Advisor and Coaching
- Team and Group Coaching
- Strategy and Governance
- IT Assessments
- Executive Presence Assessment
- IT Organization Assessment & Design
- IT Women Acceleration
- New CIO Onboarding

Representative Assignments
- C-Level IT, SVP Financial Services (focus on executive leadership, strategic change)
- C-Level IT, SVP Biopharmaceutical (focus on onboarding, baseline assessment, org change)
- Global Executive IT Director, Medical Devices (assuming expanded global role)
- IT European Director, Animal Sciences - (improving global relationships)
- Head of IT, Non-Profit US Sports Association (new leadership role, org design, strategy)
- VP IT, Military Organization (onboarding into new IT Role)
- VP IT, Healthcare Provider (work/life balance, executive presence, stress management)
- Director IT Architecture, Global Manufacturing (priority management, strategic presence)

Representative Clients
ABM Industries, BCBS CA, CareFirst, Celestica, Dow Chemical, Eli Lilly, Emergent BioSolutions, FedEx, Genworth, Howard Hughes Medical Institute, IDEXX Laboratories, Kaiser Permanente, Karl Storz Endoscopy, Liberty Mutual, LPGA, Owens Corning, The Pantry/Circle K, Univ. of Arizona, Western Union, Zimmer, Inc

“Mary possesses great listening capabilities and is a trusted advisor, committed to providing unbiased guidance in a safe/confidential environment. She focuses on eliciting information rather than telling you what to do. She personally helped me make improvements in terms of enhancing my visibility within the organization and improving my perceptions among leadership which, has led to an increase this year in the scope of my responsibilities.”

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