



Planning I.T.

A Simple Guide to Strategy

The Visioneering Methodology Explained



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“A recent Forrester survey found that although 50% of firms say that investing in systems to improve engagement with customers and partners is a high or critical priority, the majority see workforce computing technology as a cost and risk center, instead of an enormous opportunity for competitive advantage.

Why? Because there is seldom a clear destination in mind, a rational plan to get there, and a viable system in place to execute the plan. Most of the time, the destination and the means to get there are only vague estimates, and the elements of strategy are rooted in hope.”

~ David K. Johnson, Information Week

Plan IT Budget IT Staff IT Innovate IT

This guide outlines an agile approach to strategically planning and leveraging technology investments to impact business productivity and performance.

Very few, if any, tools have existed for the SMB to map out and see into the future of what their business will need in technology to transform, compete, and thrive - let alone survive.

This is your go-to resource for aligning business goals with IT investments so that strategy, leadership, resources and planning all function in tandem to create a performing, financially predictable and secure environment.

Our methodology is rather simple,
and we are sharing it with you.

It's known as Visioneering.





How informed is your internal or external IT service provider on the strategic plans and direction for the company?

How does IT create a road map of investments to meet your business goals, talent and budgetary needs?

What does IT Strategy and Planning have to do with Business Success?

True story:

During a Visioneering session, a growing company shared that they planned to add more than 15 new employees in 2017 - bringing their total population to nearly 90 folks by year end.

Increasing the workforce by 20% during a 12 month timespan without planning the technology infrastructure in advance could easily result in at least employee productivity problems and possibly major security issues.

Can you imagine if we had not asked?

What if it only took 90 minutes for your team to clarify your vision of success and current state of IT readiness? What if you could ALSO plan a path to pursue the next stage of strategic IT objectives?

Visioneering is a facilitated questioning process designed to elicit new thinking about the **Desired Future State (DFS)** of the business. We focus on the company's **specific business goals** for serving clients, employees and vendors/partners. Together we identify gaps and opportunities where IT can impact business performance and productivity. Specifically we consider the whole business ecosystem inclusive of all functional areas.

The following pages outline how you can apply Visioneering to your business.



90 Minutes to Answers

Do any of these sound like your situation?

- You have delegated IT management to an existing staff member who was not hired to manage IT or has other responsibilities.
- Your staff is overwhelmed by requests.
- Your staff does not have the technical, strategic or financial expertise.
- You have concerns about the integrity of your IT environment.
- Your IT infrastructure has grown organically and inconsistently. It is essentially a kludge of Best Buy, Fry's and employee-purchased personal devices.
- You have untracked HW/SW assets and unenforced policies resulting in poor purchasing, licensing and asset management (\$\$ liabilities/risk/loss).
- Your Business Continuity Plan (Security, Backup, Disaster Recovery) is outdated as well as your Cybersecurity prevention and planning.
- Your planning and forecasting for future IT investments is weak and you need planning and visibility for budgeting to ensure business performance, employee productivity and competitive prowess.
- Your IT assets are aging out and/or have little patch/update protection and you need a manageable plan to migrate to newer technologies (including the cloud, Software as a Service applications and specialized enterprise applications).

Problems with most planning:

1. Approach is **long** and **involved**
2. Takes away **dreaming**
3. Not **agile** / doesn't encourage **pivoting**
4. Results in **text-based documents** that lack **vitality**

Wouldn't it be easier to have:

1. One **session** / one **roadmap**
2. All functions / goals in **one reference-able page**
3. A **clear year view**, 90 day action plan and bi-weekly execution

Visioneering:

The planning session begins with these two questions:

“What does success look like?”

“What is the **Desired Future State** of the company?”

And then we dive deeper and ask the team to think about these questions as they relate to understanding where IT can impact business productivity and performance:

- Where can **technology** help?
- What **systems and processes** would help?
- **Where** should we be innovating?
- How can we **improve** the **productivity** of our team?



Why do we call our strategic plans “Road Maps”?

Just as a process and thinking goes into planning a long trip, the company needs to align IT’s understanding of the business territory and and important anticipated milestones ahead on the journey.

The strategic Visioneering planning process looks at the destination, territory and milestones along the way. It ensures that your company is equipped with the essentials for the ride. Your HST Visioneering Team will make sure your vehicle (infrastructure) is sound for the journey. Finally, we will ensure that your plan includes the pit stops for refueling and the budget to meet the needs of the travelers for such stops along the way.

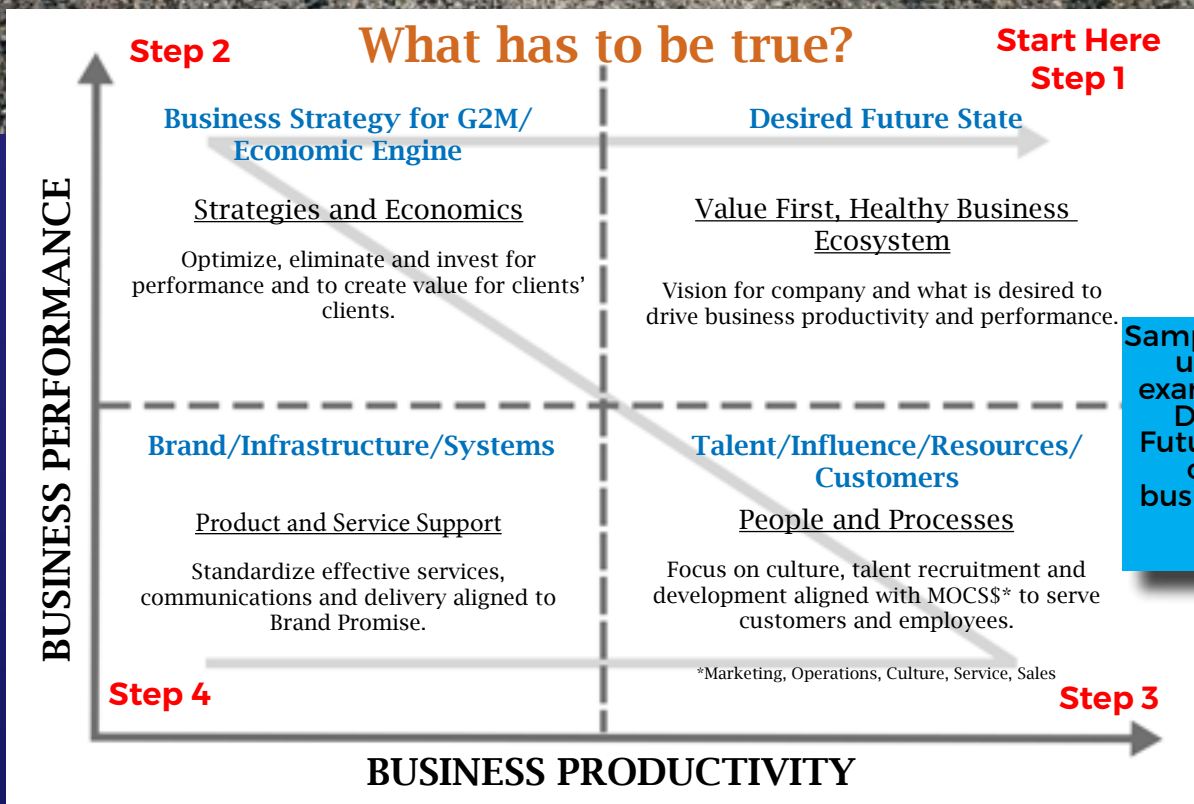
THE PROCESS

1. Explore the shared Vision for the Desired Future State of the business in a year.
2. Reverse Engineer Key Initiatives and Goals by asking questions about “What has to be true to achieve this” in THREE Core Business Areas.
 - Strategies and Economics
 - Talent, Influence and Resources
 - Brand, Infrastructure and Systems
3. Establish Gaps to Prioritize and Opportunities to Accelerate.
4. Identify immediate IT needs and long term performance and productivity requirements.
5. Evaluate your ability to execute: Time, Infrastructure, Expertise and Resources (TIER).
6. Publish and start using your IT Roadmap in 90 day, budgeted increments for execution.

Visioneering leverages a simple XY Graph to facilitate the discussion through the three core areas.

THE FRAMEWORK 08

You don't have to know HOW or WHO in the visioning backwards. Follow the backward Z!

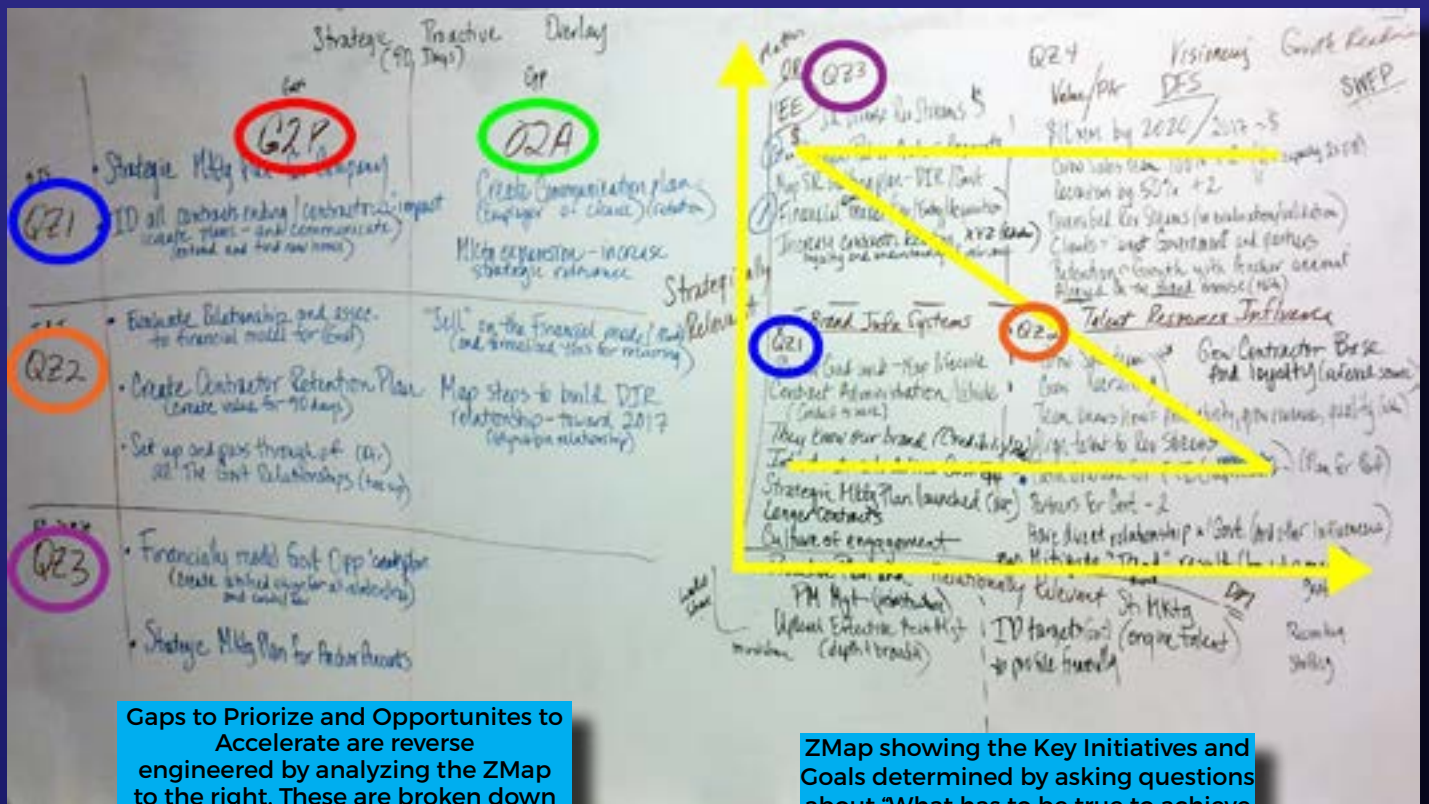


After reverse engineering, we go forward by quadrant to establish priorities as:

- Gaps to Prioritize (G2P) and
- Opportunities to Accelerate (O2A) over the next 90 days.

As you can imagine, much more than just IT needs are also revealed!

In summary, we start with the end in mind, discuss what needs to be true for success, and then step forward through the three core business areas to determine the **Gaps to Prioritize (G2P)** and **Opportunities to Accelerate (O2A)** for establishing IT related initiatives.



Gaps to Prioritize and Opportunities to Accelerate are reverse engineered by analyzing the ZMap to the right. These are broken down into the core business areas and correspond to the quadrants on the ZMap (Q21 - Q23).

ZMap showing the Key Initiatives and Goals determined by asking questions about "What has to be true to achieve this" in THREE Core Business Areas.

You've got to eat while you dream. You've got to deliver on short-range commitments, while you develop a long-range strategy and vision and implement it. The success of doing both. Walking and chewing gum if you will. Getting it done in the short-range, and delivering a long-range plan, and executing on that.

~ Jack Welch

Visioneering takes about 90 minutes and results in a list of the highest priorities, contingencies and a simple and effective way to create an actionable plan.

STRATEGIC ROADMAP PLANNING GUIDE							
DATE:	DAY OF VE	Sample Comany		TIER			
Timing	Priority	Deliverable of Service Description	ZMap Quadrant	Time/ Avail.	Infrastruc- ture	Expertise	Resource/ Budget
Gaps 2 Prioritize							
Q1	1	Migrate to Office 365 w/Policies and Procedures	QZ1				
Q1	1	Create Community Calendar Planning w/ Integrated Conferencing	QZ2				
Q1	1	Establish Off-Boarding Procedures (license, IP, HW, SW)	QZ1				
Q1	2	Acquire Loaner Computer/Live Spare	QZ1				
Q1	2	Create Onsite Resource Workstation for "Out-Of-Office"	QZ1				
Q2	3	Gather requirements for IT Asset Management (ITAM) Program - HW/SW	QZ1				
Q2	2	Evaluate VOIP Telecom Options and Determine Optimal Timeline*	QZ1				
Q2	1	Gather requirements, desires and wishes and initial planning for Office Move*	QZ3				
Q3	3	Explore Document Management Systems for Budget Savings/Environmental Concerns*	QZ3				
Q3	3	Review eCommerce Program for Savings/Up-leveling*	QZ3				
Opportunities 2 Accelerate							
Q2	3	Explore Options/Methods/Policies for Protecting Company Intellectual Property	QZ2				
Q2	4	Normalize Data for Efficient Database Management*	QZ1				
* BSG Recommendations/Support/Referrals Available							

EXAMPLE

An Example 90 Day Roadmap with detailed information about the G2P and O2A, allowing for planning and strategizing.

YOUR VISIONEERING AGENDA

- Facilitate a discussion of vision for growth a year out, and in next 90 days.
- Identify the Goals as Gaps to Prioritize (G2P) and Opportunities to Accelerate (O2A) related to how technology can impact business productivity and performance:
 - Business Strategy for Go2Market/ Processes/ Budget
 - Talent/ Influence / Resources/ Customers
 - Brand/ Martech/ Infrastructure/ Systems
- Receive outline of annual initiatives identified and 90-day IT Roadmap to start the drive from current reality to desired future state of IT for the business.
- Evaluate resources to leverage/make accountable for planning IT investments and milestones.
- Agree on the format of documentation and best path forward in support of the business.

We are sharing this methodology to help companies equip their IT Staff with leadership development, strategy, tools and resources to develop results-based plans for aligning IT with business objectives.



**Contact us to schedule a 15 minute get-to-know-you call.
We can determine your company's readiness for a
complimentary Visioneering Session.**

All we need is 90 minutes and a whiteboard!

Founded in 2004, Higher State Technology provides outsourced, Managed IT Services and Support with services ranging from one-time troubleshooting, monthly subscriptions and staff augmentation to scaling to be a company's Virtual CTO. With a diverse and talented team, HST offers SMBs affordable and scalable solutions for best practices, security, network administration and collaboration on a Strategic IT Roadmap for leveraging technology in business performance.



“Erase boundaries between IT and the business.”

Deloitte’s 2016 Global CIO Survey of 1,200 IT executives found that 78 percent of respondents view strategic alignment as the organizational capability most critical to IT’s success.

<https://tinyurl.com/y9gw2p29>

“...few IT organizations have all the talent and expertise that they will need to meet ever-evolving demands for new systems, tools, and capabilities.”

Excerpt from “IT unbounded: The business potential of IT transformation Tech Trends 2017” from Deloitte University Press

Read the entire article at <https://tinyurl.com/y8eatgb7>

THE VALUE WE OFFER:

An Innovative Partnership offering strategy, planning and expert execution to manage IT investments that pivot and scale as you do.

PRODUCTS WE OFFER:

- IT Strategic Plan Development, Road Maps, Forecasts and Budgets
- IT Environment Audits and Risk Assessments
- IT Architecture and Physical Design
- Managed Services / Deskside Support/ Help desk
- Cloud Services
- Device and Software Asset Management (SAM)
- Hardware-as-a-Service
- Security and Cyber Security
- Project and Process Management

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