

Data Strategy Maturity Assessment

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Data strategy maturity importance

The data strategy needs to resonate with both key business and IT stakeholders on the plan for leveraging the strategic value of data. A more mature, robust and comprehensive data strategy does a better job of achieving this goal.



Business Stakeholders

Convince business stakeholders of how the data strategy supports the business. Gain executive sponsorship and support, buy-in, approval for additional budget, approval for role definitions and very importantly, help build and foster a data driven culture.



IT Partners

Convince IT staff of the data strategy. Demonstrate the importance of how each IT initiative is towards advancing the organization.

IT strategy maturity overview

The IT strategy maturity is a function of an overall assessment and a sectional assessment.



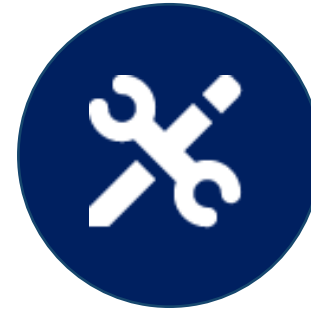
IT strategy maturity assessment components

Overall Assessment



This is an assessment of the IT strategic plan as a whole. This assessment is not focused on a particular section of the strategy. This assessment is focused on evaluating the IT strategy document holistically against different criteria.

Sectional Assessment



This assessment evaluates each section of the IT strategy (e.g. Target state) and its sub-sections (e.g. IT Goals). The assessment examines whether each sub-section met the level of detail necessary to produce an effective IT strategy.

IT strategy maturity results



Overall Assessment: **3**

Business Orientation: **2**

Budget Considerations: **4**

Initiative Detail: **3**

Insights Generated: **3**

Visual Appeal: **2**

Logical Flow: **3**

Sectional Assessment: **3**

Business Context Assessment: **2**

Target State Assessment: **3**

Current State Assessment: **2**

Gaps and Roadmap Assessment: **3**

Level 1

- Both the overall assessment and the sectional assessment produced an average of level 1.
- Many components of what make up an effective IT strategy are non-existent.

Level 2

- Both the overall assessment and the sectional assessment produced an average of level 2.
- Some components of what make up an effective IT strategy are missing.
- Most existing components require rework to improve their quality.

Level 3

- Both the overall assessment and the sectional assessment produced an average of level 3.
- Few if not all components that make up an IT strategy are present.
- Some existing components require rework to improve their quality.

Level 4

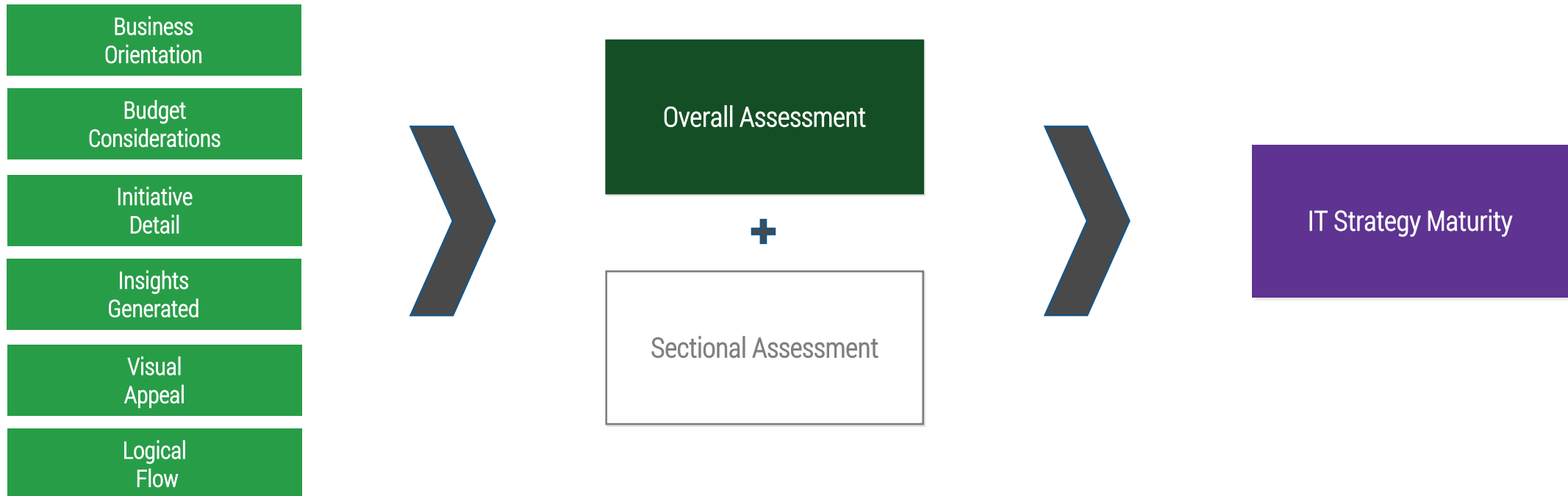
- Both the overall assessment and the sectional assessment produced an average of level 4.
- Few if not all components that make up an IT strategy are present.
- A significant majority of existing components are of high quality and maturity.

Overall Assessment

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IT strategy overall assessment overview

The Overall Assessment is made up of six criteria.



IT strategy overall assessment criteria

Assessment Criteria	Details
Business Orientation	Assesses the level of at which the IT strategy demonstrates its support of the business context.
Budget Considerations	Evaluates the budgeting estimations done as part of the strategy and if the budget paints a full picture of the IT department and its situation.
Initiative Details	Determines the key initiatives outlined in the strategy and whether there are compelling arguments made for the execution of current and future key initiatives.
Logical Flow	Evaluates the strategy in terms of the story it tells and if readers can understand how the pieces work together.
Visual Appeal	Assesses whether the strategy is visually appealing enough to engage stakeholders to follow along.
Insights Generated	Determines if the IT strategy generates any “a-ha” moments for readers and if the strategy generates any key takeaways not previously known by business or IT executives.

Business orientation assessment results

This slide shows the business orientation assessment score



Level 1

- The IT strategy was developed absent of the business context.
- No business context documentation or stakeholder interviews were used to inform the development of the IT strategy.

Level 2

- Some level of business context discovery was conducted prior to IT strategy development.
- The business context is documented as part of the IT strategy.
- It is not clear how the IT target state is derived from the business context.
- No linkage is shown between how IT supports the business context.

Level 3

- Business context discovery was conducted prior to IT strategy development.
- The business context is not only documented as part of the IT strategy, it is clear that the IT target state is derived from the business context.
- Linkage is shown as to how IT initiatives and goals support the business context.

Level 4

- The linkage between how IT will support the business is very clear.
- Readers can easily point to how IT initiatives can support business goals and/or capabilities.
- Clear depiction of how the IT target state is derived from the business context is present.

Budget considerations results

This slide shows the budget considerations assessment score



Level 1

- There is no budget considerations presented in the IT strategy.
- IT budget is separate from the IT strategy.

Level 2

- There is a high-level current and required future budget present.
- Many IT initiatives are missing the status of their budgets.
- The budget is only projected out for the next fiscal year.

Level 3

- There is a high-level current and required future budget present.
- A significant majority of IT initiatives have information around their budgets.
- There is a high level “ask” and/or summary present in the budget section.

Level 4

- The budget is clearly defined for both future and current IT initiatives.
- Budgeting status and gaps are assigned for each IT initiative.
- The budget is projected out for the entire time horizon of the IT strategy.
- The budget is presented in a way that presents clear decision-making points for stakeholders.

Initiative details results

This slide shows the initiative details assessment score



Level 1

- There is a list of IT current and future IT initiatives that will be executed.

Level 2

- There is a list of current and future IT initiatives.
- In addition to the list, there is at least one additional element listed for the initiatives (e.g. start-end date, accountability, budget, etc.).

Level 3

- There is a list of current and future IT initiatives.
- There is distinction between key IT initiatives and non-key IT initiatives.
- Accountability, execution schedule, and budget status are all present for each IT initiative.

Level 4

- There is a list of current and future IT initiatives.
- There is distinction between key IT initiatives and non-key IT initiatives.
- Accountability, execution schedule, and budget status are all present for each IT initiative.
- Furthermore, alignment of key IT initiatives to IT and business goals are present.
- Additionally, for key IT initiatives, business benefits, dependencies, and risks are summarized.

Insights generated results

This slide shows the insights generated assessment score



Level 1

- IT strategy process was not conducive to insight generation.
- Further, no insights were generated as part of IT strategy development.

Level 2

- There is at least one piece of insight generated as part of the strategy.
- The insight changes the way IT and business stakeholders perceive a certain aspect of the IT department.
- The insights are documented in the strategy.

Level 3

- There are at least two insights generated as a result of developing the IT strategy.
- The insights are actionable and in the judgment of the IT strategy development team provide significant value.
- The insights are documented in the strategy.

Level 4

- There are more than two insights that are generated as part of the IT strategy development process.
- The insights are actionable and in the judgement of the IT strategy development team provide significant value.
- The insights are documented and can be presented to stakeholders.

Visual appeal assessment results

This slide shows the visual appeal assessment score



Level 1

- The IT strategy is visually unflattering. It consists of only paragraphs of text.

Level 2

- The strategy requires the viewer to read text for a significant portion of the strategy.
- Visuals exist for key messages only.

Level 3

- The majority of the components in the IT strategy consists of visual diagrams.
- Paragraphs of text exist to solely compliment the visual information.

Level 4

- The IT strategy provides strong visualizations of how IT supports the business and what IT aims to do in the strategy.
- Visuals clearly consolidate text information.
- Roadmaps, diagrams, graphs, make up a vast majority of the strategy.
- Standalone paragraphs of text are far and few in between.

Logical flow assessment results

This slide shows the logical flow assessment score



Level 1

- The IT strategy documentation is difficult to understand from narrative perspective.
- There is no linkage between one section to the next.

Level 2

- The IT strategy components flow smoothly only for small portions of the strategy.
- There are significant lengths of the strategy that are confusing for readers.

Level 3

- The IT strategy components flow smoothly for large portions.
- There are a few sections that are confusing for readers.

Level 4

- The IT strategy components flow very smoothly.
- Readers can easily understand how one section leads to the next.
- The IT strategy tells a clear story of how IT supports the organization.

Overall assessment results

This slide shows the overall assessment score



Level 1

- On average the holistic assessment scores are at level 1.
- Evidence of business context orientation, visual are non-existent.
- Information around budget, initiatives, and insights are sparse.
- Logical flow is extremely poor.

Level 2

- On average the holistic assessment scores are at level 2.
- Business context orientation is not clear, some visuals are present.
- Logical flow is only demonstrated in sections.
- Budget and initiatives include more details.
- There is one insight in the strategy.

Level 3

- On average the holistic assessment scores are at level 3.
- Business context orientation is clear, visuals are present in most of the strategy.
- Logical flow is demonstrated in large portions.
- Budget and initiatives include more granular levels of detail.
- There are two actionable insights that are in the strategy.

Level 4

- On average the holistic assessment scores are at level 4.
- Business context orientation is very clear.
- Visuals are present throughout the strategy.
- Logical flow is clear to readers.
- Budget and initiatives meet the highest standards of documentation.
- There are more than two insights in the strategy. The insights are clearly presented to readers.

Overall assessment recommendations

This slide recommends different ways to increase the IT strategy maturity

Recommendations:

- The IT strategy is already very mature. To create a even more mature IT strategy add more information around the business context into the IT strategy document.
 - For example, add business goals and factors impacting the business.
- The key takeaways of the IT strategy can be emphasized up front. Distill the key takeaways clearly and provide information around the key takeaways at the front of the IT strategy document.
- The document has many uninterrupted blocks of text reducing its visual appeal. Create more tables, charts, and graphs for easier digestion by the reader.

Sectional Assessment

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Sectional assessment overview

The sectional assesses each section of the IT strategy. The evaluation consists of how far each section of the IT strategy is from best practices.



Gaps and Omissions

Based on an assessment from Info-Tech's analysts.

This section determines what is missing from the listed best practices for each section.



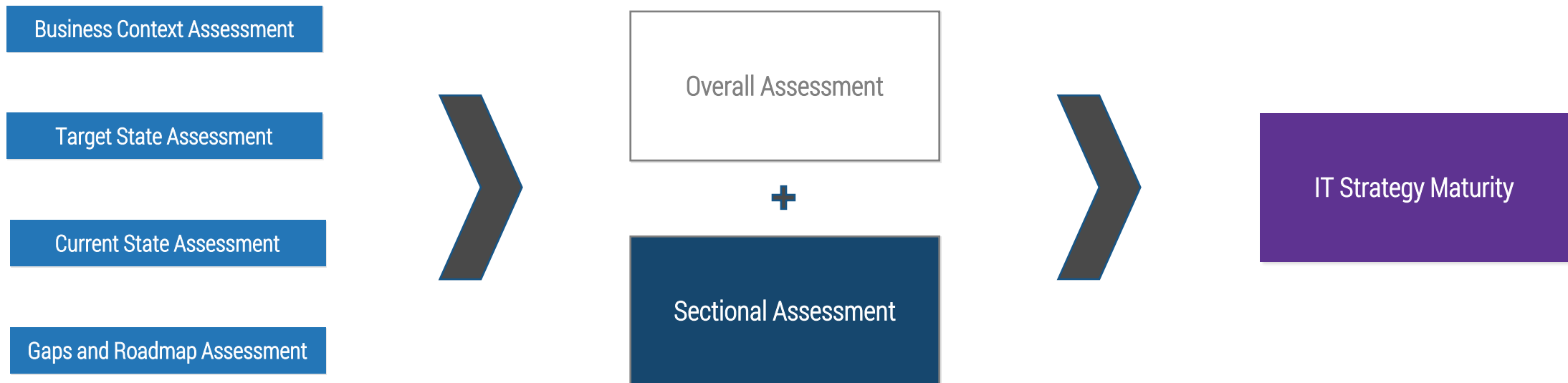
Recommendations

Provided by Info-Tech's analyst based on analysis of your strategy.

This section provides information on what needs to be addressed from gaps and omission to reach the best practice state.

IT strategy maturity sectional assessment

The IT strategy maturity is a function of the overall assessment and sectional assessment

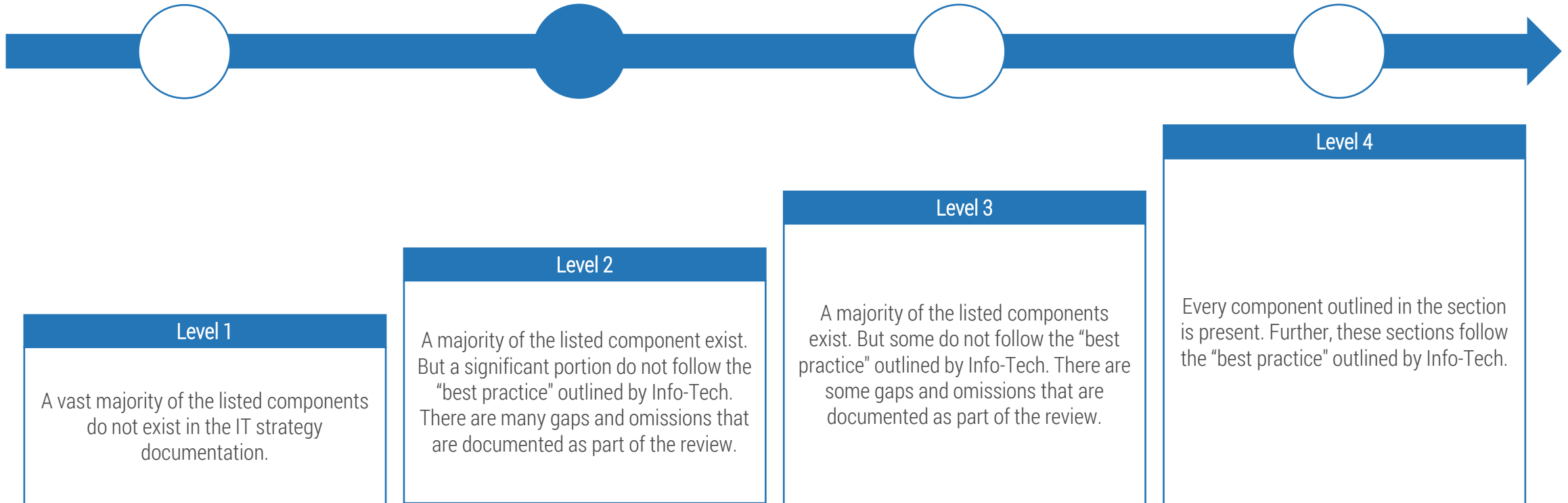


IT strategy overall assessment criteria

Assessment Criteria	Details
Business Context	Assesses the business context section of the IT strategy. Determines if the ideal level of business context information has been provided to create an effective IT strategy.
Target State	Evaluates the target state section of the IT strategy. Determines if the details provided for the target state depicts a clear picture of what IT envisions its future to be.
Current State	Assesses the current state section of the IT strategy. Evaluates if enough analysis has been done to determine IT's current standing.
Gaps and Roadmap	Evaluates the gaps and roadmap section of the IT strategy. Assesses if gaps are being addresses and if the next steps for the IT strategy is clear.

Business context assessment results

This slide shows the business context assessment score



Target state assessment results

This slide shows the target state assessment score



Level 1

A vast majority of the listed components do not exist in the IT strategy documentation.

Level 2

A majority of the listed component exist. But a significant portion do not follow the "best practice" outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

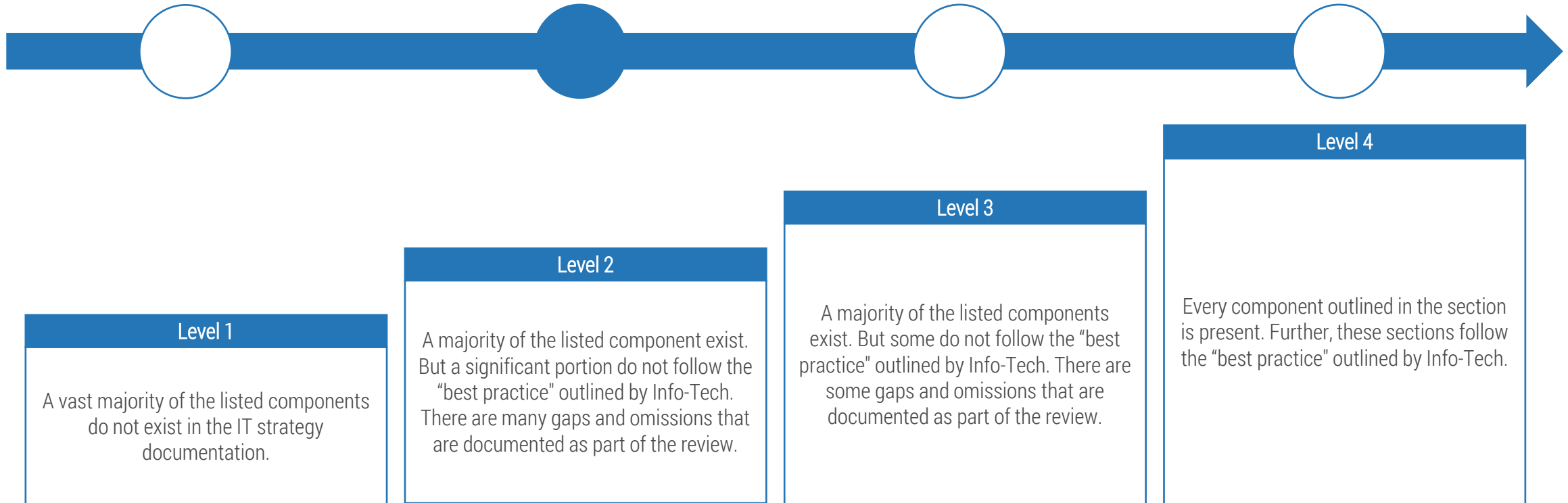
A majority of the listed components exist. But some do not follow the "best practice" outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

Every component outlined in the section is present. Further, these sections follow the "best practice" outlined by Info-Tech.

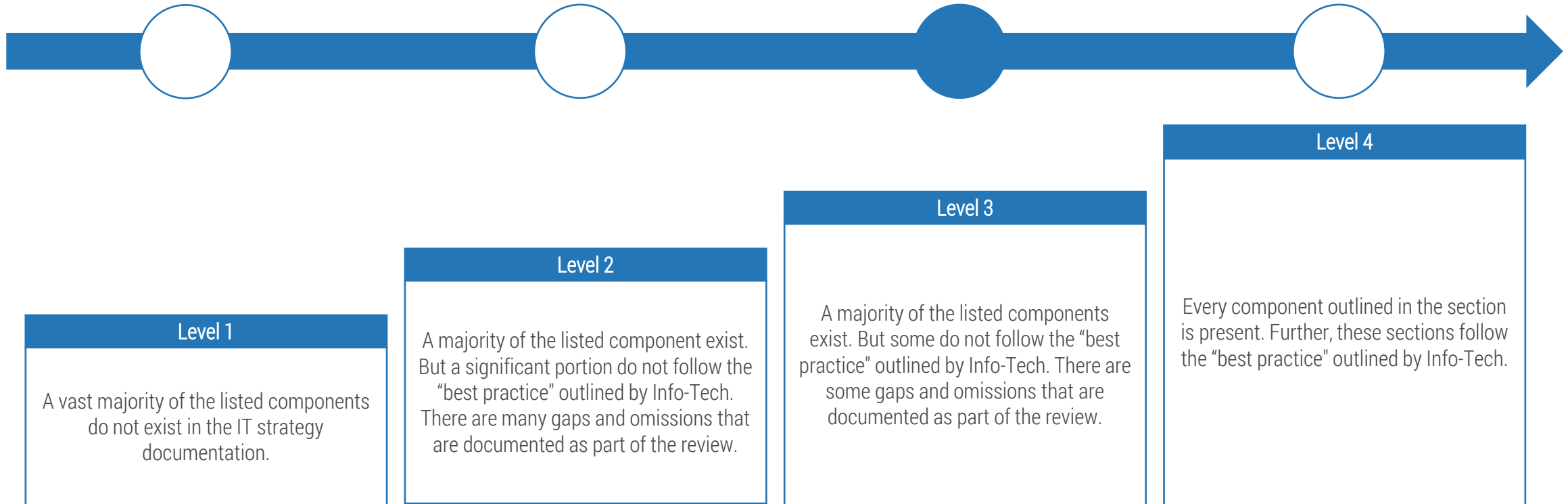
Current state assessment results

This slide shows the current state assessment score



Gaps and roadmap assessment results

This slide shows the gaps and roadmap assessment score



Sectional assessment results

This slide shows the sectional assessment score



Level 1

A vast majority of the listed sections do not exist in the IT strategy documentation.

Level 2

A majority of the listed sections of the IT strategy exists. But a significant portion do not follow the “best practice” outlined by Info-Tech. There are many gaps and omissions that are documented as part of the review.

Level 3

A majority of the listed sections of the IT strategy exists. But some do not follow the “best practice” outlined by Info-Tech. There are some gaps and omissions that are documented as part of the review.

Level 4

A vast majority of the listed sections of an IT strategy outlined by Info-Tech exists. Further, these sections follow the “best practice” outlined by Info-Tech.

Sectional assessment recommendations

This slide recommends different ways to increase the IT strategy maturity

Recommendations:

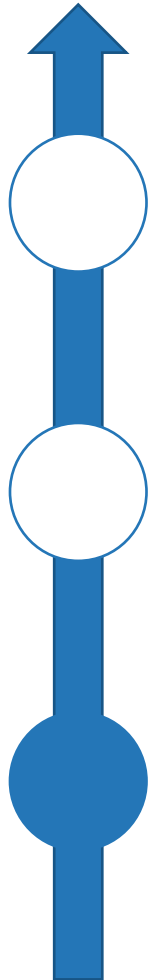
- There are sections in the strategy that are very strong and some that fall short.
- Mainly the business context portion has many areas that can be improved upon. Clear statement of the organization's vision statement and mission statement are required.
- Further, clearer, more visual representation of the organization's goals would also be welcomed.
- On the target state, a visual of the alignment between IT goals and business goals will really emphasize IT's support of the organization.
- Utilizing an IT maturity scale will provide a stronger emphasize for the difference between IT's current state to IT's target state.
- Measure IT's performance using different diagnostics and surveys. Input benchmark data into the IT strategy depict how IT compares to its peers.
- Connect IT initiatives to business goals to show how each IT project will support the business.
- Sum the budget required in the target state to depict the different between the current IT budget and the budget that will be needed in the target state.
- Create different audiences and tailor messages to each audience for the communication plan and the refresh plan.

Sectional Assessment: Business Context

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Business goals, capabilities and initiatives assessment



Gaps and Omissions

Business Goal to Business Initiative

- For each business goal there are at least two business capabilities/business initiatives that are defined to support the business goal.

Business Goal Details

- Each business goal has accompanying "sub-goals" or details that describe key actions and milestones of the goal.

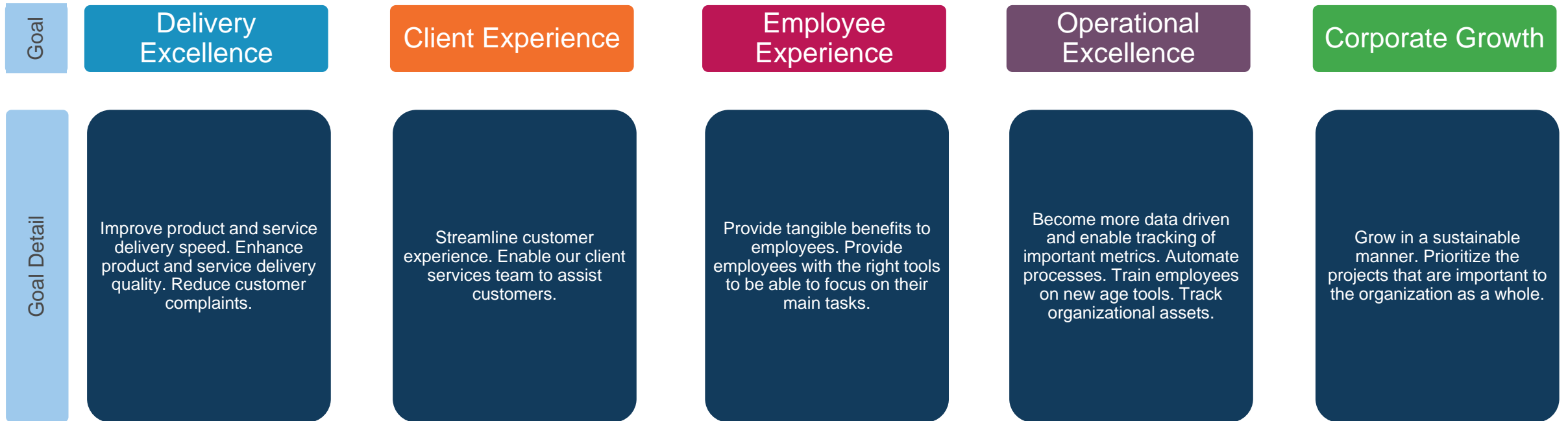
Business Goals

- ✓ There is a list of business goals present in the IT strategy.
- ✓ The business goals are derived from corporate documents OR the business goals were discovered through interviews with stakeholders.

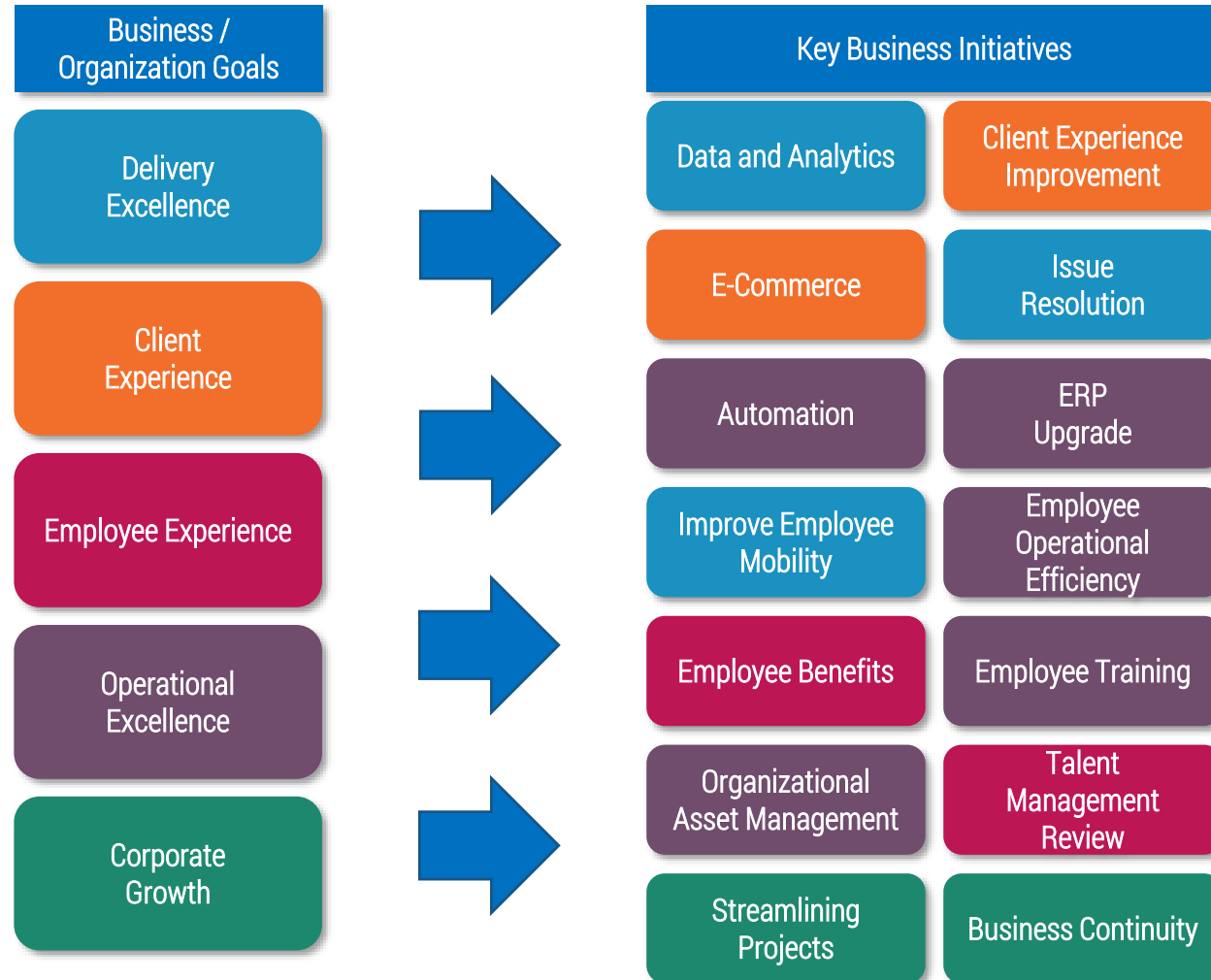
Recommendations:

- Provide more details regarding each goal presented. Instead of simply listing the goal, also actions that each goal would need to entail.
- To further strengthen this section, add business capabilities and/or business initiatives that would support the listed goals.

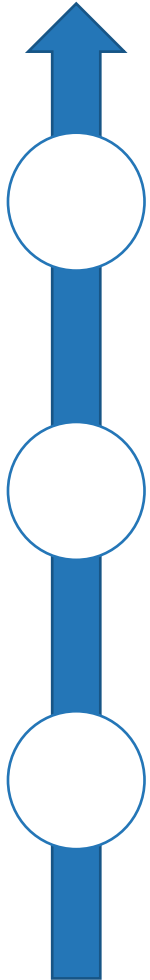
Business goals, capabilities and initiatives example



Business goals, capabilities and initiatives example



Organization vision and mission assessment



Gaps and Omissions

Connection to IT Strategy

- The IT strategy development team can clearly articulate how the IT strategy supports the organization's vision and mission statement.

Statement Message

- The IT strategy development team can clearly articulate the message of the organization's vision and mission.

Vision and Mission Statements

- The organization's vision and mission statements are both present in the IT strategy.

Recommendations:

- It is not clear that the organization's mission and vision statement are listed in the IT strategy document.
- List the organization's vision and mission statement. Afterwards, provide details on how IT will support the organizational vision statement and mission statement.

Organization vision and mission example

Vision

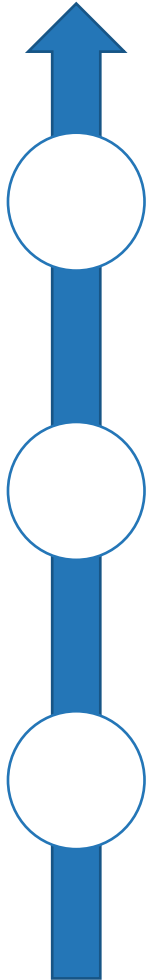
Become a respected leader and partner in <industry>, improve our customer's quality of life.

Mission

Provide safe, reliable, and environmentally responsible products and services.

Source: XXXX

External analysis assessment



Gaps and Omissions:

External Factor Completeness

- The external analysis take into account these six factors: Political, Economic, Social, Technological, Legal, and Environmental.

External Factors

- There is an analysis based on the at least three different external factors (e.g. Political, Economic, Social etc.)

Basic External Analysis

- There is an analysis on external factors impacting the organization.

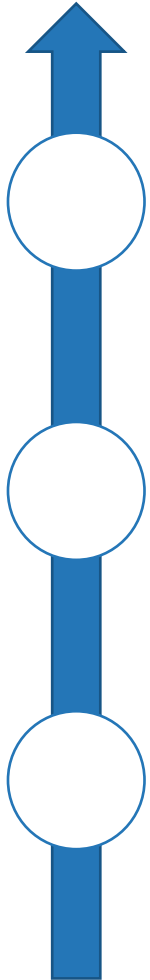
Recommendations:

- Present a more in-depth external factors analysis. Provide the external analysis section with more organization by classifying each factor under a category.
- Conduct an external factor analysis with additional perspective.
- Refer to the PESTLE Analysis section in the blueprint Define the Business Context Needed to Complete Strategic IT Initiatives for instructions on how to complete.

PESTLE example

Political	<ul style="list-style-type: none"> • Federal taxation changes • Foreign government market impact • GDPR • Brexit driven market fluctuations • NAFTA changes • Currency impact • Political impacts on regulatory compliance • Impact on discretionary income of clients 	<ul style="list-style-type: none"> • Markets fluctuations driving investment • Hedging opportunities • Outsourcing infra – reliability • Regulatory impact – filing requirements • Market rate impacts for talent • M&A impacts 	Economic
Social	<ul style="list-style-type: none"> • Demographics – aging client base • How to attract Millennials • Social tools – instant feedback, peer tools • Social conscience – environmental, cyber-security • Market social responsibility 	<ul style="list-style-type: none"> • Constant demand for “the best” <ul style="list-style-type: none"> • Always something new • Fear of change • Solution decision • In-house vs cloud • XAAS • RPA • Cloud • AI 	Technological
Legal	<ul style="list-style-type: none"> • Legal impact of business processes / decisions • Changing regulatory rules • New rules that drive policy creation and compliance • Educating staff on regulations and implications of non-compliance • New industry standards – focusing on client interaction • Audit requirements • Privacy impacts and compliance – mandatory reporting 	<ul style="list-style-type: none"> • Push to being environmentally friendly • Reduction in paper • Reduction in energy consumption • DR BC 	Environmental

Common themes assessment



Gaps and Omissions:

Common Themes Description

- For each theme, there is a description section that articulates the pain points experienced and the value gained from addressing the pain points.

Common Themes Data Gathering

- The common themes are gathered from at least three sources (e.g. multiple interviews and/or documents).
- The themes gathered are clearly identified in the IT strategy.

Common Themes

- There is a section of the IT strategy that outlines the key themes gathered from business stakeholder interviews and business document analysis.

Recommendations:

- There is currently no common themes analysis present. There is mention of interviews conducted.
- Categorize the interview information and present it in a manner that addresses the common themes of the interview.
- Refer to the Stakeholder Interviews section in the blueprint Define the Business Context Needed to Complete Strategic IT Initiatives for instructions on how to complete.

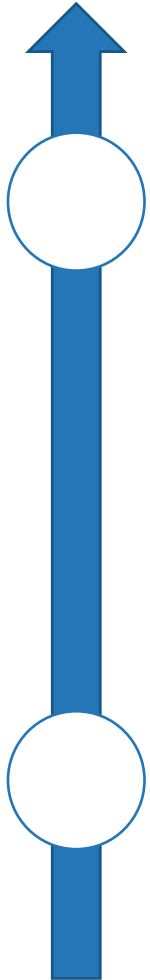
Common themes example

Themes	Description
Project Prioritization	There is a lack of clear project prioritization from the business side, which has caused resources to be spread too thin resulting in delays or delivery quality issues. Ensuring priority projects align with long-term strategy will help dedicate the necessary capacity towards the most important tasks.
Adaptive Technology	Technology available for internal and client-facing processes has not kept up with the rate of change of the business, which is driven by industry change and customer expectations.
Regulatory Changes	Regulatory changes, as well as the rate of regulatory change, are areas where IT can play a role in ensuring compliance.
Security	With increasing digitization, the organization opens itself up to more cyber security risk. Given the nature of the industry, a security breach would present a significant risk to the company's reputation.
Innovation	There is a need to achieve a balance between incremental and disruptive innovation. IT needs to be an advisor to the business in terms of emerging technology that can help solve business problems.
IT as Business Partner	IT and the business need to work together to generate solutions for business problems. For this to work, IT needs to build business awareness, and the business needs to engage IT in strategic conversations early in the process.
Business Growth	The business is growing through M&A as well as organically. Furthermore, growing diversity of product and revenue demands are creating technological and cultural challenges.
Digitized Onboarding	A faster and more seamless experience for customers is a business priority. Digitized onboarding will accomplish this by streamlining the current process, which relies heavily on paper forms.
Succession Planning	Certain IT staff are essential through their vast and specialized knowledge, and their loss would present a significant risk. A highly tenured workforce is both a strength and a challenge in terms of ensuring the organization has the right skills to keep up with industry changes and aligning skillsets with long-term strategy.

Sectional Assessment: Target State

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IT implications assessment



Gaps and Omissions:

Seven Perspectives

- ❑ The IT implications analysis for each goal covers the following seven perspectives:
 - ❑ **People:** What are the possible effects on IT from a roles and capacity perspective?
 - ❑ **Process:** What impacts to processes, their complexity, documentation, etc., would occur as a result of the business context?
 - ❑ **Technology:** What changes to applications and infrastructure need to happen to facilitate the directions set out in business context?
 - ❑ **Data:** What are the changes from a data and information perspective that need to occur as a result of the business context?
 - ❑ **Sourcing:** What sourcing changes and decisions need to be made to facilitate the business context?
 - ❑ **Location:** What additional locations or changes to locations might affect IT?
 - ❑ **Timing:** What changes in cycle time need to occur to enable the business context? What are the timing dependencies from the business context that need to be factored in to prioritize IT projects?

IT Implications

- ❑ There is a list of IT implications called out in the strategy.
- ❑ The IT implications are clearly based on the business goals and their corresponding business capabilities/business initiatives.

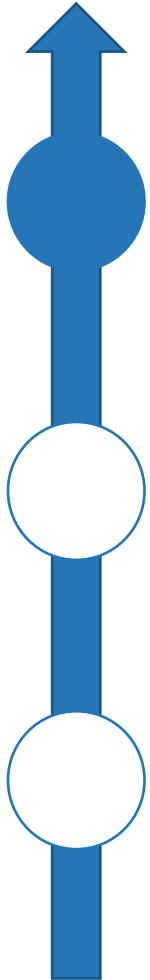
Recommendations:

- There are no listed IT implications based on the business context in the IT strategy.
- Refer to section 1.2 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT implications example

Business Goal & Business Initiatives	IT Implication
<p data-bbox="351 496 713 691">Delivery Excellence</p> <p data-bbox="387 714 677 825">Data and Analytics</p> <p data-bbox="387 848 677 959">Issue Resolution</p> <p data-bbox="387 982 677 1093">Improve Employee Mobility</p>	<ul data-bbox="784 482 2257 1236" style="list-style-type: none">• Need more cross-training to ensure IT isn't "one deep" in terms of expertise.• May have to leverage consultants in order to manage processes (can help with staffing issues)• Communication around setting expectations will have to be improved• Need to look at what IT currently has and what is needed to support the business to the level the business wants (example: what staffing levels are needed in order to support the business)• Service Level Agreements (SLA) would help to improve customer service• Need to identify primary owners for support, who the contacts are if you need to go back to the vendor• Need to refine processes to make them more streamlined (onboarding, training)• Unclear who owns data currently, need to formalize this – need to formalize data retention policies as well• Need to identify the customer expectations for IT support and coverage• Need to look at resource capacity to better handle demand management• Customer participation will be critical to this goal• Require consistency in processes from the customers in order to know how to act moving forward• Need to stay current with technology• Need to define and build the relationship between the IT and OT group (define roles and responsibilities)• Need to define a standard processes around communication• IT needs to learn more about the different business units• Define IT requirements across different department budgets

IT strategy scope assessment



Gaps and Omissions:

Scope Clarity

- Each section of scope is clearly laid out.
- ✓ It is clear from reading the scoping document what the scope of the IT strategy will be.

Scope Components

IT strategy scope addresses the following:

- ✓ Breadth: The different aspects the strategy will address (e.g. people, process, technology etc.)
- Depth: The level of detail the IT strategy will have.
- ✓ Organizational coverage: Which part of the organization will the IT strategy support.
- ✓ Planning horizon: When the target state will be reached and the length of the roadmap.

IT Strategy Scope

- ✓ There is some language in the IT strategy explaining the scope of the IT strategy.

Recommendations:

- The sections of scope are not clearly laid out, although they are present. There was no language around the depth of detail to be provided for the IT strategy.
- Clearly identify the level of detail provided by the IT strategy. Further, delineate each section of scope clearly in the IT strategy document.
- Refer to section 1.3 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT strategy scope example

Breadth

The IT strategy will address process, people, technology, sourcing, location and data changes.

Depth

The depth of coverage for the IT strategy will be at the initiative level.

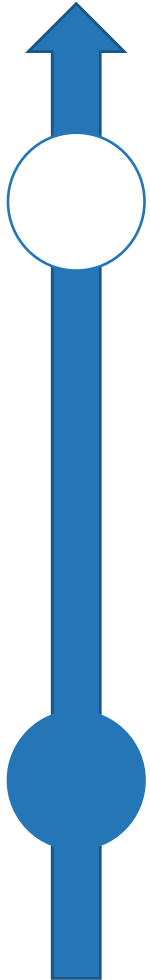
Organizational Coverage

The IT strategy will cover the North American operations only.

Planning Horizon

The planning horizon of the IT strategy will be to the end of 2021.

IT vision and mission statements assessment



Gaps and Omissions:

Connection to Organization

The statements follow these characteristics:

- Vision statement: Describes a desired future. Focuses on ends, not means. Aspirational. Memorable. Concise.
- Mission Statement: Articulates purpose. Describes how to achieve the vision. Easy to grasp. Sharply focused.
- The IT team can clearly articulate how the statements support the organization.
- The wording in the statements is succinct. The wording conveys the exact meaning of the statements.

IT Vision and Mission Statement

- ✓ There is a IT vision statement and IT mission statement present in the IT strategy.

Recommendations:

- The vision statement and mission statement for IT are mentioned. But they are not depicted clearly in the strategy.
- Create a separate section for the vision statement and mission statement.
- Refer to section 1.4 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT vision/mission statements example

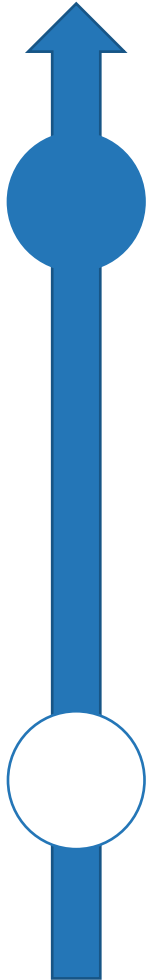
Vision

To be a trusted technology partner empowering the business through innovation and efficiency.

Mission

We deliver the best technological solutions for new and existing business opportunities through collaboration with our stakeholders.

IT guiding principles assessment



Gaps and Omissions:

Characteristics and Additional Context

- ✓ The IT principles meet the characteristic that will make them adhered to and relevant.
 - ✓ Organization specific
 - ✓ Long lasting
 - ✓ Prescriptive
 - ✓ Verifiable (compliance to principles can be verified)
 - ✓ Easily digestible
 - ✓ Followed and emphasized in the organization
- ✓ Each principle has a rationale section; the business benefits and reasoning for establishing the principle is documented.
- For each principle, the implications of when the principle is to be applied is also listed. More than one situation of when the principle is to be applied is listed.

IT Vision and Mission Statement

- ✓ There are at least 3 IT guiding principles present.
- ✓ For each IT guiding principle, the principle is named, and the details of the principle are explained.

Recommendations:

- IT guiding principles are listed in the IT strategy document. The IT guiding principles listed do not possess a implications section.
- Refer to section 1.4 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT guiding principles example

IT Principle 1: Enterprise value focus

We aim to provide maximum long-term benefits to the enterprise as a whole, while optimizing total costs of ownership and risks.

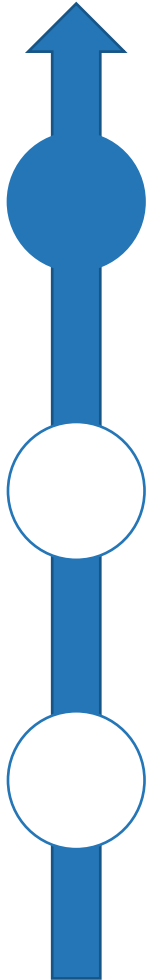
Rationale

- Solutions must aim to maximize the cumulative business benefits over their entire lifecycle.
- Enterprise priorities are above priorities of a business unit or a project.
- Total cost of ownership is more important than the cost to buy/build alone.
- Risk governance and management are integral elements of the company's operating model.

Implications

- Link all investment proposals to business/IT strategy and goals.
- Track and demonstrate business value realization on all major investments.
- Prefer common solutions and shared services that benefit the enterprise over one-off solutions for one business unit.
- Analyze and take into account organizational readiness for adopting new solutions.
- Manage development and operational risks on every project and acquisition.
- Include the total cost of ownership analysis for the proposed solution or solution options for every investment (project or acquisition) proposal.
- Prefer vendor-independent solutions to avoid vendor lock-in and enable competitive sourcing.

IT strategic goals assessment



Gaps and Omissions:

IT Goal Development

- ✓ Each IT goal can be traced back to IT implications developed from the business context.

IT Goal Clarity

- ✓ Each IT goal has a name and a corresponding statement explaining the details of the goal.
- ✓ The IT goal name and explanation is easily understandable by all audiences.

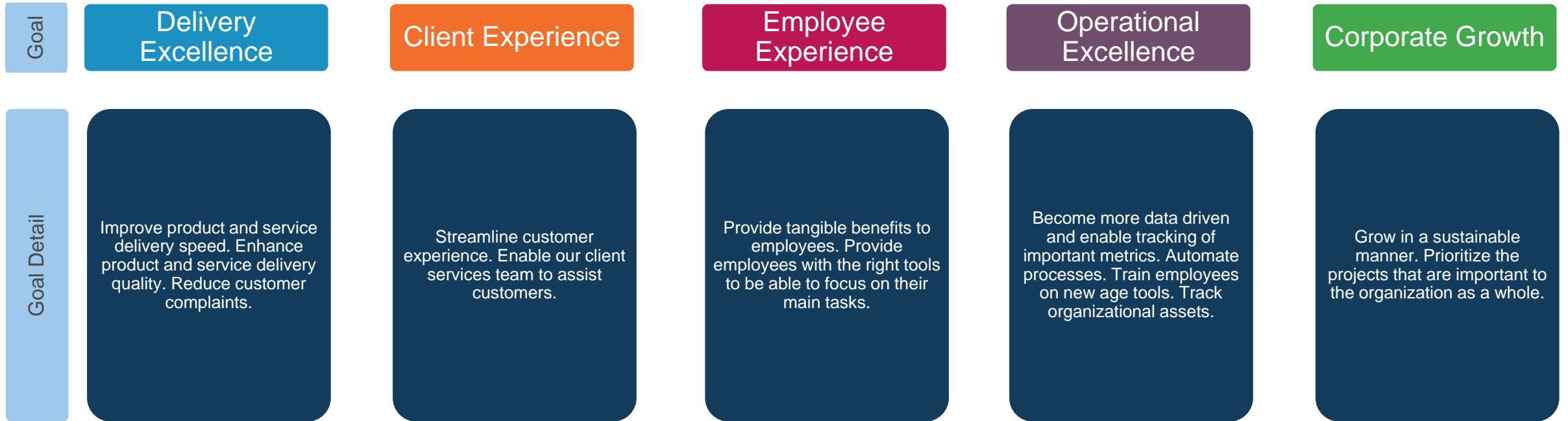
IT Goals

- ✓ There are 3 to 7 IT goals present in the IT strategy.

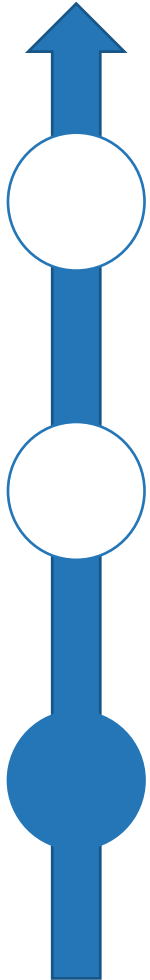
Recommendations:

- The IT goals section is strong and well developed.

IT strategic goals example



IT goal alignment assessment



Gaps and Omissions:

Presentation

- The relationship between each IT goal and their corresponding business goals can be succinctly explained to all audiences.

Connection to Business Goal

- The relationship between each IT goal and their corresponding business goals is intuitive. The audience can easily see why a particular IT goal is connected to a certain business goal.

Goal Alignment

- IT goal alignment to business goals is present.
- There is an established relationship between each IT goal and at least one business goal.

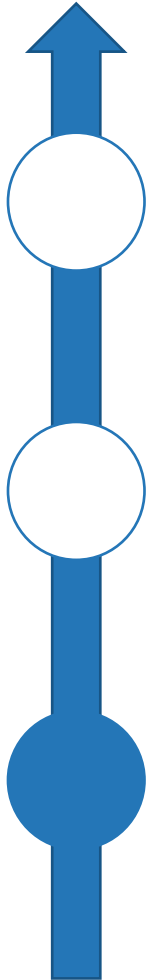
Recommendations:

- There is currently no depiction of IT goals being linked to business goals.
- Create a linkage between IT goals to business goals to explain how IT will support the organization's objectives.
- Refer to section 1.6 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT goal alignment example



IT target state maturity assessment



Gaps and Omissions:

Additional Details

- A timeline is set out as to when IT will achieve the target state maturity.
- There is a short summary of what IT is lacking in the current state that needs to be improved to reach the target state.

Target State Maturity

- IT's target state maturity is clearly indicated, and a reason is provided to explain why this target state maturity is selected.

IT Maturity Assessment

- A maturity scale is used to indicate the target state maturity of IT.

Recommendations:

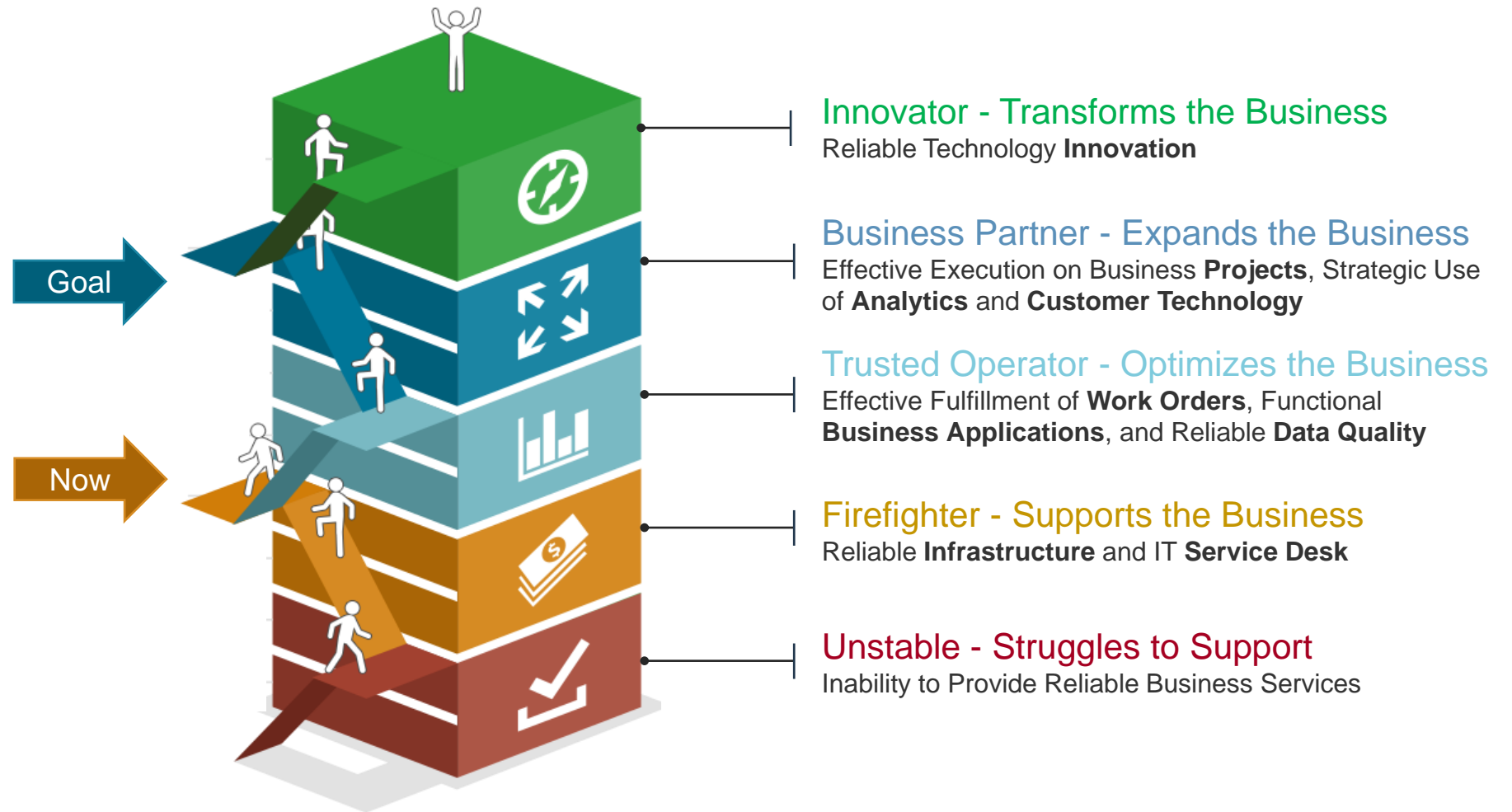
- There is no indicated maturity scale.
- Info-Tech recommends using Info-Tech's maturity ladder to succinctly communicate where IT's future state maturity.
- Refer to section 1.7 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT target state maturity example

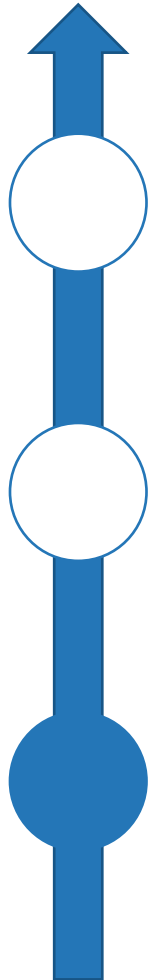
The IT team currently operates at the upper level of *Firefighter*, on the cusp of *Trusted Operator*.

By the end of the current IT strategic plan, in 2021, the team would like to move up the maturity ladder to *Business Partner*

It is important to note, that the IT organization currently has processes and capabilities that operate in the higher levels, but overall functions as a Firefighter.



IT target capabilities assessment



Gaps and Omissions:

Prioritized IT Capabilities

- ✓ There is a prioritization to the listed capabilities.

Linkage to IT Goals

- The list of capabilities are linked to at least one IT goal.
- The linkage of IT goals to target IT capabilities are clearly indicated.

Identified IT Capabilities

- ✓ A set of IT capabilities are identified as important for IT to reach the target state.

Recommendations:

- A list of IT capabilities to enhance, maintain, and redesign for the target state is provided.
- Link the IT capabilities provided to IT goals.
- The list of IT capabilities are prioritized in terms of importance.
- Refer to section 1.8 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT target capabilities example



Provide predictable and resilient systems, services and solutions.



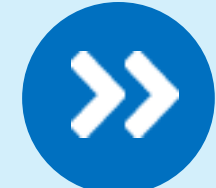
Create seamless end-to-end interactions that drive value and satisfaction.



Foster a culture that succeeds through communication, execution and leading by example.



Promote an organization built on continuous improvement and adaptability.



Deliver solutions, systems and data that focus on delivering value.

Organizational Change Management

Stakeholder Relations

Business Value

IT Organizational Design

Manage Service Catalogs

Innovation

Business Value

Application Development Throughput

Organizational Change Management

Performance Measurement

Cost Optimization

Security Management

Project Delivery (PM, PPM, RG)

Human Resources Management

Service Management

Business Intelligence and Reporting

Data Quality

Data Architecture

Requirements Gathering

Business Value

Application Design and Management

Enterprise Architecture

Requirements Gathering

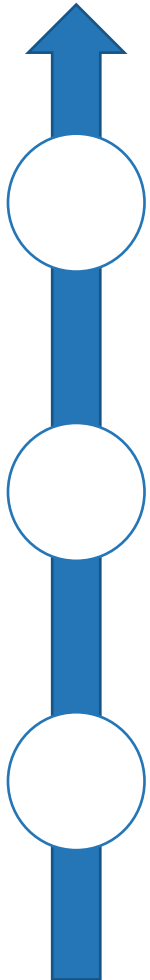
Business Value

Security Management

Sectional Assessment: Current State

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Diagnostics and benchmarking assessment



Gaps and Omissions:

Comparisons and Details

- There is a benchmark provided in the IT strategy that measures how IT compares to industry peers.
- The diagnostic data are analyzed and areas of IT capability deficiencies are documented, for each of the diagnostics.

IT Leadership Diagnostic

- There is one diagnostic/survey completed by IT executives on IT effectiveness.

Business Leadership Diagnostic

- There is one diagnostic/survey completed by business stakeholders on IT satisfaction.

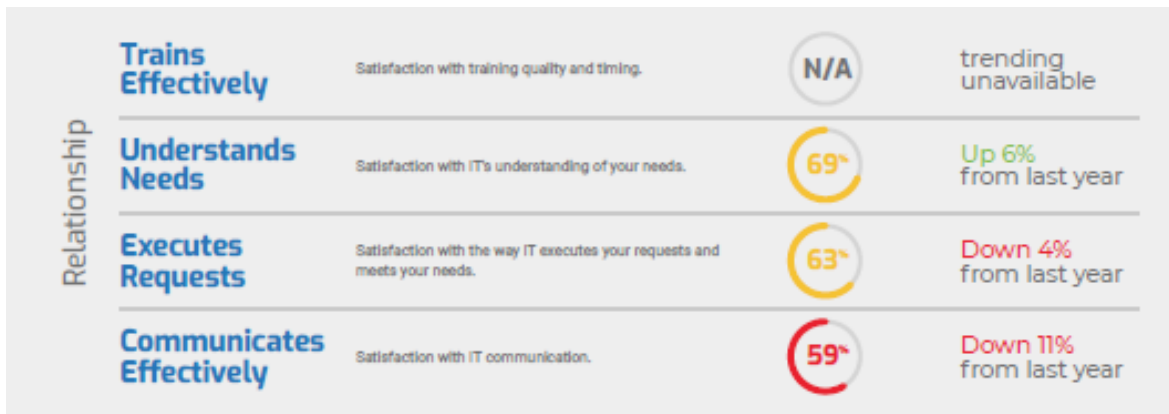
Recommendations:

- There are no benchmarks present in the IT strategy document. Use Info-Tech's diagnostic benchmarking services to understand where the organization stands compared to peers.
- There were no diagnostics/surveys conducted to assist with creating the IT strategy.
- Use Info-Tech's CIO BV diagnostic to understand business leader satisfaction with IT.
- Use Info-Tech's MGD diagnostic to understand IT leader satisfaction with IT processes.
- Refer to section 2.1-2.3 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

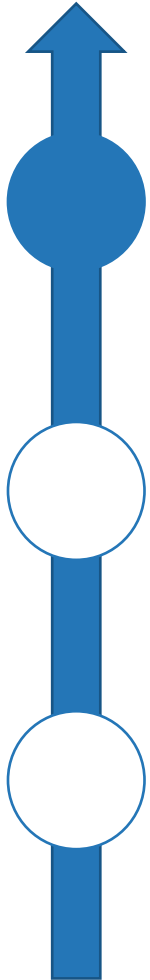
Diagnostics and benchmarking example

The Business' View of IT

Business stakeholders were surveyed on their views of IT. Results showed a high level of importance on Network and Communication Infrastructure, and low levels of satisfaction with Data Quality, and Analytical Capability and Reports.



Current IT capabilities assessment



Gaps and Omissions:

IT Capability Improvement Details

- ✓ For each IT capability, the reason for improvement is documented.
- ❑ For each IT capability improvement area, the diagnostic where the improvement suggestion is coming from is documented.

IT Leadership Assessment

- ✓ IT capabilities that are identified by IT leadership as needing improvement are documented.
- ✓ Themes identified by IT leadership are grouped and linked to IT capability improvement areas if applicable.

Business Leadership Assessment

- ✓ IT capabilities that are identified by business leadership as needing improvement are documented.
- ✓ Themes identified by business leadership are grouped and linked to IT capability improvement areas if applicable.

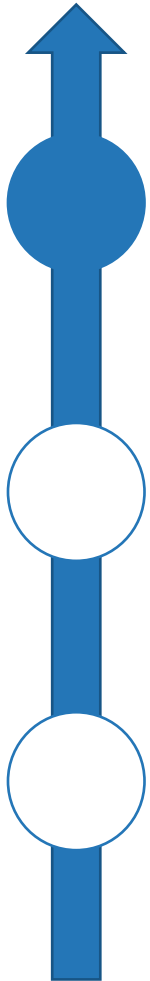
Recommendations:

- There is a list of current IT capabilities that need to be improved based on input from IT leadership and business leadership.
- The linkage the inputs of from business leadership and IT leadership to each IT capability improvement can be made clearer.
- Refer to section 2.4 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Current IT capabilities example

Focus Areas	Detail
Stakeholder Relations	<ul style="list-style-type: none"> • Significant misalignment with stakeholder regarding, IT budgeting and headcount changes. Will need to improve stakeholder relations process to enhance communication between IT and stakeholders.
Project Management	<ul style="list-style-type: none"> • Project management and its corresponding components were denoted by both IT and the business as ineffective.
Analytical Capability and Reports, Business Reporting	<ul style="list-style-type: none"> • There is a desire from the business to consume more reports. Business stakeholders are frustrated by the lack of standard reports and the lack of actionable data.
IT Governance	<ul style="list-style-type: none"> • Interactions with IT can differ from one person to the next, there is a need for greater consistency in IT processes and services to ensure uniform delivery.
Organization Change Management	<ul style="list-style-type: none"> • Multiple respondents expressed frustration with the fact that apps were cumbersome to navigate. There is a greater desire to ensure that employees are made aware of how applications assist with their tasks and how it will impact them beforehand.
Security Management	<ul style="list-style-type: none"> • General dissatisfaction from IT management on the lack of effective security management. Strategy is well planned but unfortunately the execution of the strategy is lacking.
Data Quality	<ul style="list-style-type: none"> • General consensus between the business and IT is that data quality is poor throughout the organization.
Requirements Gathering	<ul style="list-style-type: none"> • Many respondents did not know the definition of “requirements gathering”. Those that were clear were frustrated by the process. There is a sentiment that IT does not understand the business units and a desire from some areas employ BRMs (an example was used of how accounting uses business managers).

Current IT budget assessment



Gaps and Omissions:

Additional Details for Budget

- ✓ A visual representation of capital and operating expenditure increase or decrease is in place for the entire duration of the IT strategy.

Details for Budget

- ✓ A visual representation of capital and operating expenditure increase or decrease between the current fiscal year or subsequent fiscal year is present.

Basic Budget Information

- ✓ Capital expenditure and operating expenditure totals are outlined for the current fiscal year and the subsequent fiscal year.

Recommendations:

- The current IT Budget section meets the best characteristics set out in effective IT strategies.
- Refer to section 2.5 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

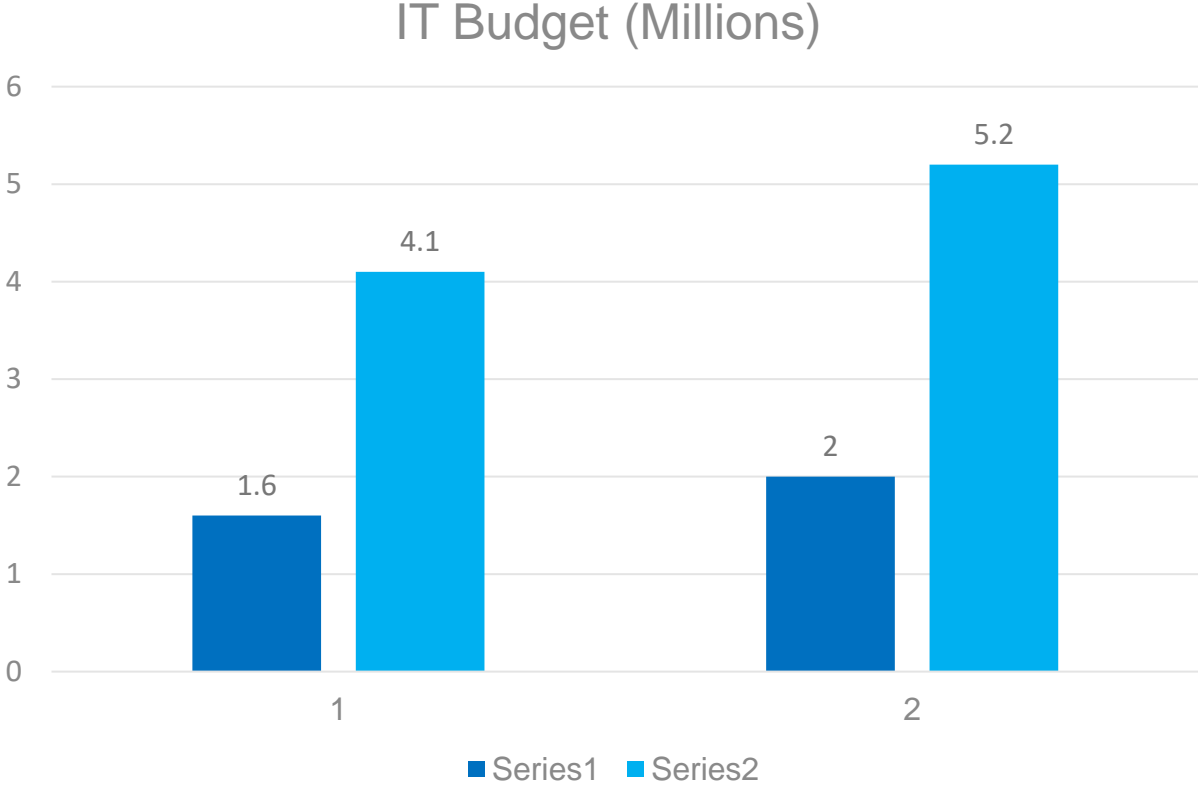
Current IT budget example

2018 – CapEx \$1.6 million, OpEx \$4.1 million

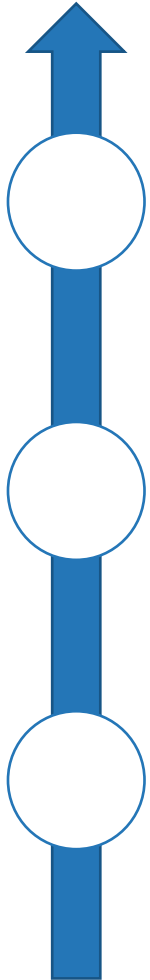
- 2018 OpEx includes \$1.8M in salaries, \$1.0M for SW and HW maintenance, \$500k for telephony and data, and \$500k for consulting

2019 – CapEx \$2.0 million, OpEx \$5.2 million

- 2019 OpEx includes \$2.2M in salaries, \$1.0M for SW and HW maintenance, and \$800k for consulting



IT internal and external factors assessment



Gaps and Omissions:

Analysis Details

- ❑ Analysis of each area includes:
 - ❑ IT capabilities
 - ❑ Staff skillset
 - ❑ Organizational culture
 - ❑ Political, environmental, technological, social changes

Lens of Analysis

- ❑ The analysis includes the following perspectives:
 - ❑ Strength: The areas that the department does well in.
 - ❑ Weakness: The areas that the department does not do well in.
 - ❑ Opportunities: External factors that the department can leverage.
 - ❑ Threats: External factors that can threaten the influence of the department.

Internal and External Factors

- ❑ There is an analysis of internal and external factors impacting the IT department.

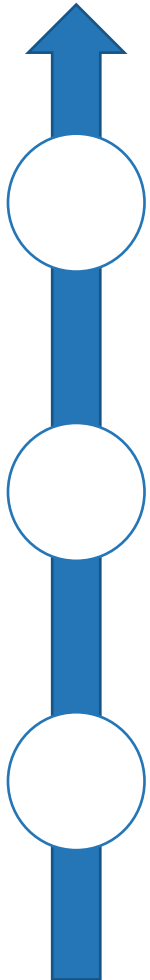
Recommendations:

- No internal and External analysis was conducted for the IT department as part of the IT strategy.
- Refer to section 2.6 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

IT SWOT example

	Helpful <i>to achieving the objective</i>	Harmful <i>to achieving the objective</i>
Internal origin <i>attributes of the organization</i>	<p>Strengths</p> <ul style="list-style-type: none"> • Strong internal collaboration/communication • People – hard working, quality work, skilled, engaged • Service orientation • Strong technology change management process • Business Relationship Consultants • Customer communication and engagement (maintenance) • Project management capability has improved • Manage large quantities of data • High availability of systems 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Asset management • Resource / staffing capacity constraints, turnover • Insufficient resources to meet customer demand • Capacity and demand management • Quality management • Perception of inconsistency in urgency of response to client needs • Failure to meet customer expectations • Work prioritization and governance • Incomplete data center redundancy / disaster recovery • Consistently learning customer needs
External origin <i>attributes of the environment</i>	<p>Opportunities</p> <ul style="list-style-type: none"> • Cloud computing, SaaS, disruptive technology • Enterprise tools (PM, testing, monitoring, automation, etc.) • Leverage public private partnerships • Population growth increases talent pool, revenue • Become more flexible and agile • Ongoing risk management 	<p>Threats</p> <ul style="list-style-type: none"> • Outages of external vendors • Economic downturn • Change in government / officials / policy / legislation • Unplanned / unfunded / ad-hoc customer requests • Other organizations poach employees • Population growth requires more services • Natural disasters • Siloed culture

IT current state maturity assessment



Gaps and Omissions:

Additional Details

- There is a short summary of what IT is lacking in the current state that needs to be improved on to reach the target state.

Current State Maturity

- IT's current state maturity is clearly indicated and a reason is provided for why this current state maturity is selected.

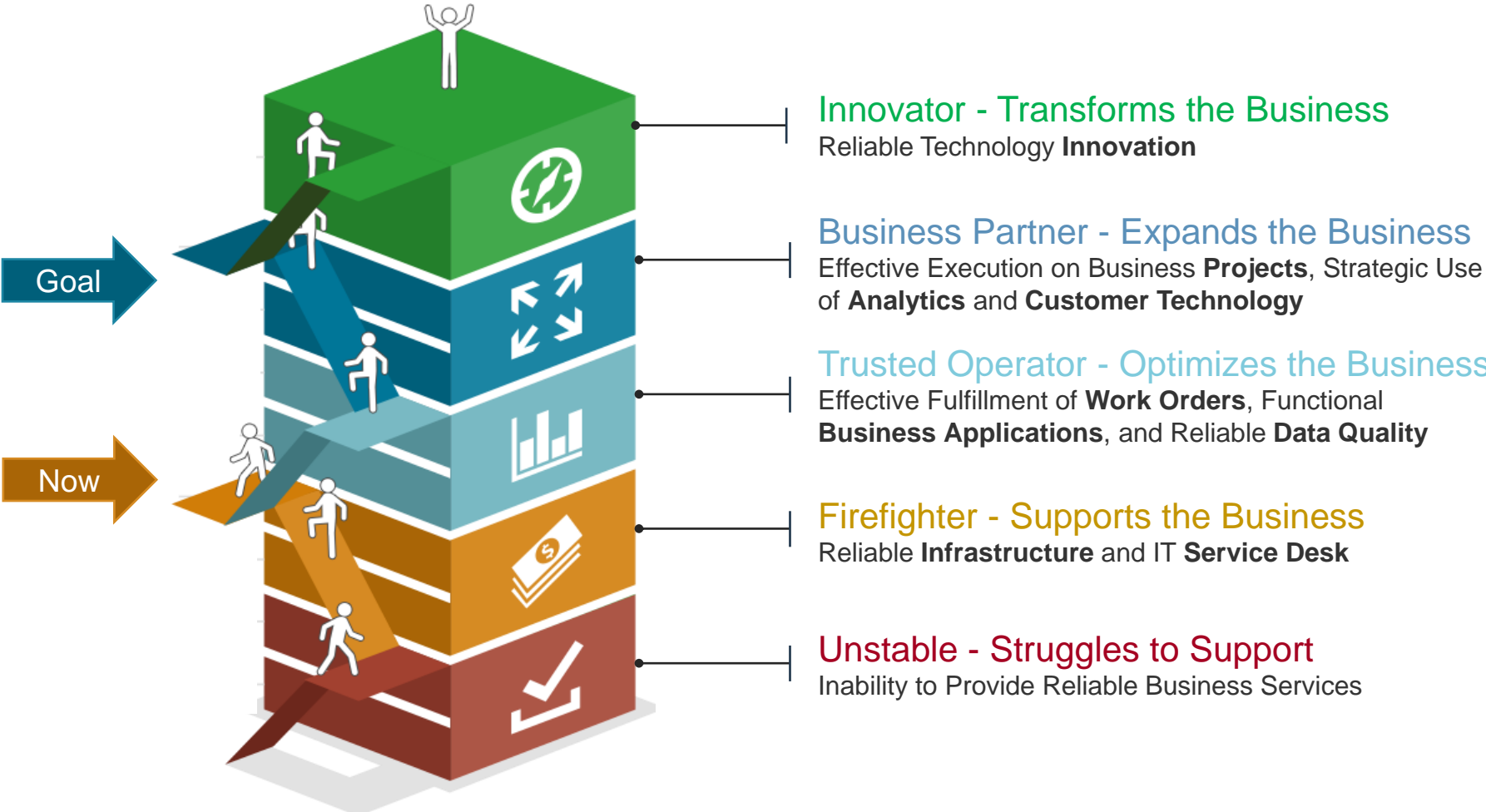
IT Maturity Assessment

- A maturity scale is used for measuring the current level of IT maturity.

Recommendations:

- There is no maturity scale used to assess the IT current state maturity.
- Refer to section 2.7 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

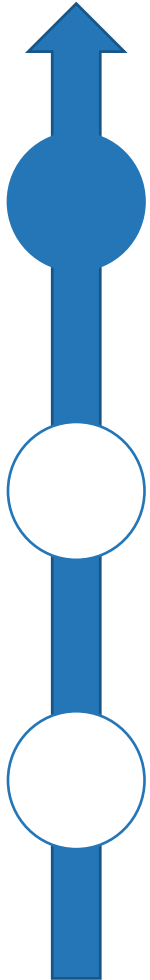
Current IT maturity example



Sectional Assessment: Gaps and Roadmap

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Overall gap analysis assessment



Gaps and Omissions:

Additional Gap Details

- ✓ There is a list of high-level steps highlighting what needs to be enhanced, redesigned or maintained for each gap identified.

Gap Status

Each gap in capability is given a status. For example:

- ✓ Enhanced: The capability needs to be improved from its current state.
- ✓ Develop/Redesign: The capability must be built new or completely revamped.

Overall Gap Assessment

- ✓ There is a section in the strategy that discusses gaps in IT capabilities from the current state to the target state.

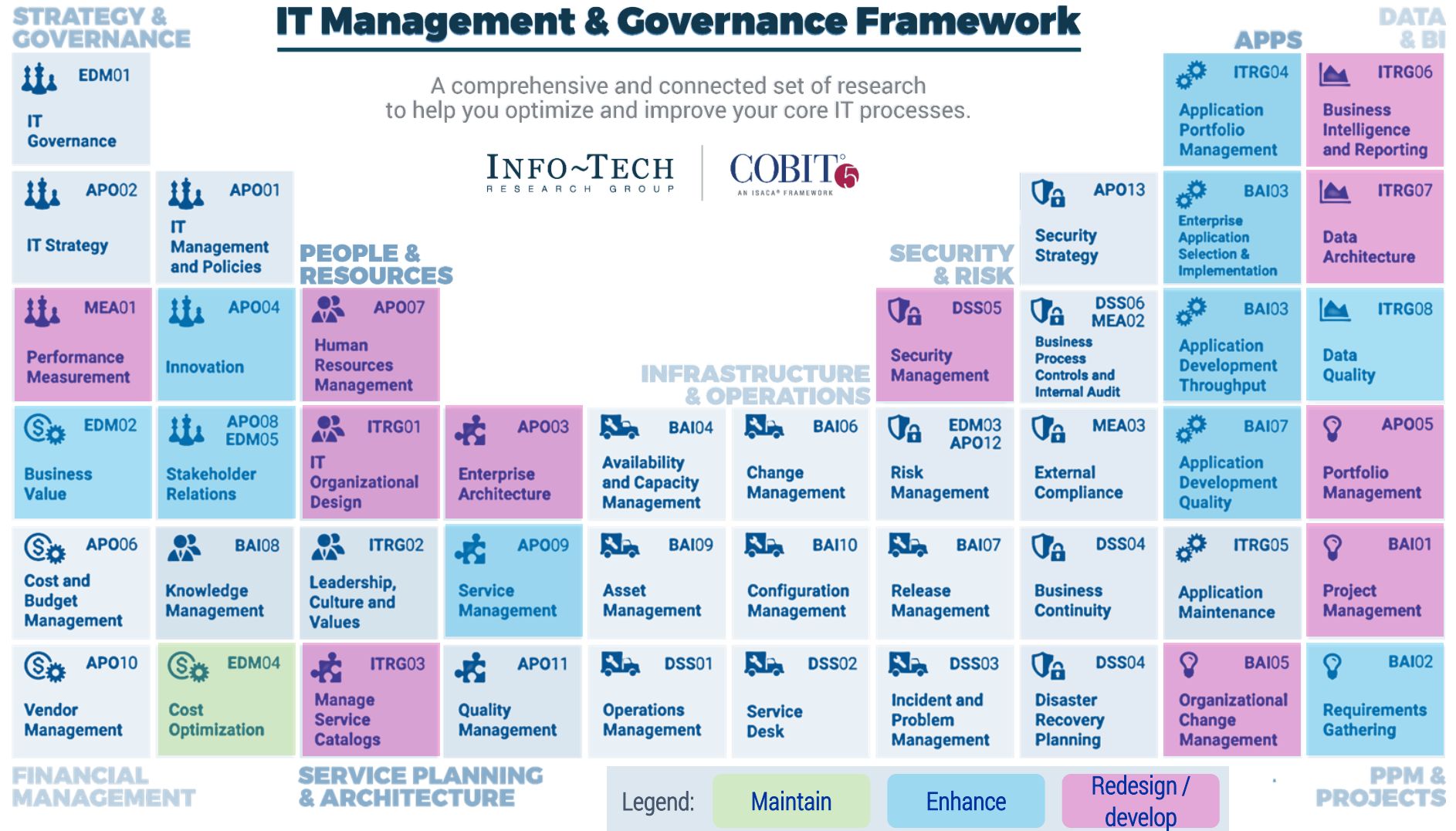
Recommendations:

- The IT strategy has satisfied all the characteristics of creating an effective overall gap analysis section.

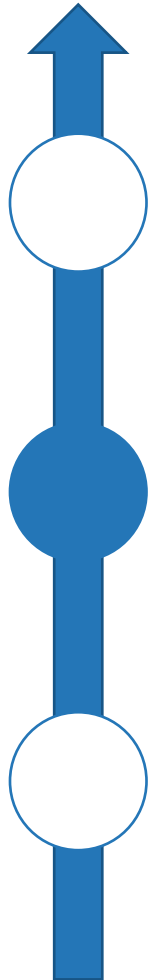
Overall gap analysis example

To support the business in achieving its strategic imperatives, IT identified key capabilities that represent opportunities for growth within the following domains:

- Strategy & Governance
- Financial Management
- People & Resources
- Service Planning & Architecture
- Security & Risk
- Apps
- Data & BI
- PPM & Projects



Target state IT capability gaps assessment



Gaps and Omissions:

Linked to IT Goals

- ❑ These identified target IT capability gaps are linked to at least 1 IT goal.

Gap Status

Each gap in capability is given a status. For example:

- ✓ Enhanced: The capability needs to be improved from its current state.
- ✓ Develop/Redesign: The capability must be built new or completely revamped.

IT Capability Gaps

- ✓ There is a list of IT capabilities identified that are the focus areas to reach the IT target state.

Recommendations:

- The gaps between current and target state capabilities are clearly depicted.
- Link the IT capabilities to the IT goals to create a succinct way to communicate how each IT capability improvement will assist the organization.
- Refer to section 3.1 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Target state IT capability gaps example

Legend:

Maintain

Enhance

Redesign / Develop



Provide predictable and resilient systems, services and solutions.



Create seamless end-to-end interactions that drive value and satisfaction.



Foster a culture that succeeds through communication, execution and leading by example.



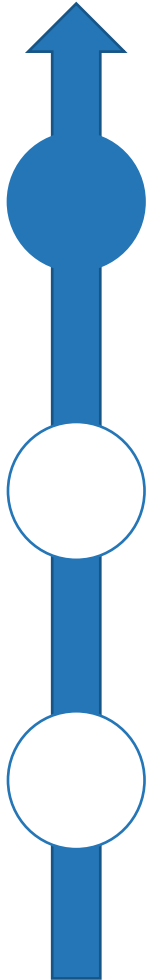
Promote an organization built on continuous improvement and adaptability.



Deliver solutions, systems and data that focus on delivering value.

Organizational Change Management	Innovation	Cost Optimization	Business Intelligence and Reporting	Application Design and Management
Stakeholder Relations	Business Value	Security Management	Data Quality	Enterprise Architecture
Business Value	Application Development Throughput	Project Delivery (PM, PPM, RG)	Data Architecture	Requirements Gathering
IT Organizational Design	Organizational Change Management	Human Resources Management	Requirements Gathering	Business Value
Manage Service Catalogs	Performance Measurement	Service Management	Business Value	Security Management

Current IT initiatives to IT goals assessment



Gaps and Omissions:

Linked to IT Goals

- ✓ IT initiatives are linked to IT goals in a visual manner.
- ✓ Each critical current IT initiative is linked to at least one IT goal.
- ✓ Each IT goal has at least two current IT initiatives linked to it.

IT Initiative Delineation

- ✓ There is a delineation between critical current IT initiatives vs. non-critical.

Current IT Initiatives

- ✓ There is a list of current IT initiatives.

Recommendations:

- The IT strategy has satisfied all the characteristics of creating an effective current IT initiative to IT goals section.

Current IT initiatives to IT goals example



Provide predictable and resilient systems, services and solutions.



Create seamless end-to-end interactions that drive value and satisfaction.



Foster a culture that succeeds through communication, execution and leading by example.



Promote an organization built on continuous improvement and adaptability.



Deliver solutions, systems and data that focus on delivering value.

Refresh end-user devices
Application lifecycle management review & analysis
Data Analytics roadmap
Service Management enhancement
MDM Project

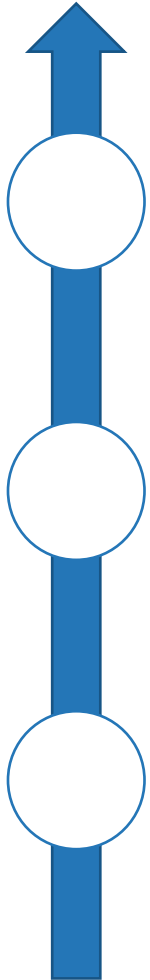
Call center upgrade
Website refresh

IT strategy rollout to IT team
Job shadowing within IT and between IT and business
Reward program for IT employees
IT culture review with senior leadership
IT recruitment process review

ERP assessment
Tool and vendor evaluation for testing automation
Service desk software and asset management tool upgrade
Current industry membership review
Engagement of 3 rd parties for learning and training
Quarterly updates at Executive meetings

Enterprise architecture tool assessment
Review of intake process for business projects
Review of intake process for IT projects

Current IT initiatives to business goals assessment



Gaps and Omissions:

Linked to Business Goals

- IT initiatives are linked to business goals in a visual manner.
- Each critical current IT initiative is linked to at least one business goal.
- Each business goal has at least two current IT initiatives linked to it.

IT Initiative Delineation

- There is a delineation between critical current IT initiatives vs. non-critical.

Current IT Initiatives

- There is a list of current IT initiatives.


Recommendations:

- IT Initiatives are not linked to business goals.
- Complete the activity IT Goal Alignment in the Target State to better link IT initiatives to business goals.
- Refer to section 3.4 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Current IT initiatives to business goals example



Delivery Excellence



Client Experience



Employee Experience



Operational Excellence



Corporate Growth

- Refresh end-user devices
- Application lifecycle management review & analysis
- Data Analytics roadmap
- Service Management enhancement
- MDM Project

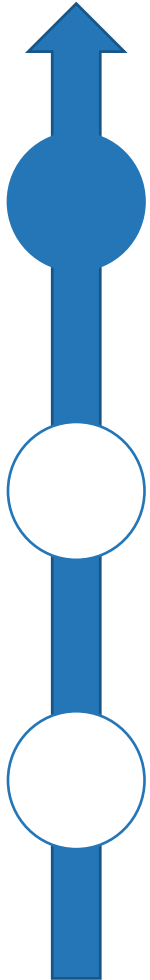
- Call center upgrade
- Website refresh

- IT strategy rollout to IT team
- Job shadowing within IT and between IT and business
- Reward program for IT employees
- IT culture review with senior leadership
- IT recruitment process review

- ERP assessment
- Tool and vendor evaluation for testing automation
- Service desk software and asset management tool upgrade
- Current industry membership review
- Engagement of 3rd parties for learning and training
- Quarterly updates at Executive meetings

- Enterprise architecture tool assessment
- Review of intake process for business projects
- Review of intake process for IT projects

Future IT initiatives to it goals assessment



Gaps and Omissions:

Linked to IT and Business Goals

- Future IT initiatives are linked to IT and business goals in a visual manner.
- Each critical future IT initiative is linked to at least one IT and business goal.

IT Initiative Clarity

- ✓ Each future IT initiative can be traced to one of the IT capability gaps that were identified.

Future IT Initiatives

- ✓ There is a distinct list of IT initiatives that are define to address the gaps in the IT strategy
- ✓ There is a delineation between critical future IT initiatives vs. non-critical.

Recommendations:

- Future IT initiatives are linked to IT goals and capabilities but not business goals.
- Complete the IT Goal Alignment exercise in the Target State section to link future IT initiatives to business goals.
- Refer to section 3.7 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Future IT initiatives to IT goals example



Provide predictable and resilient systems, services and solutions.



Create seamless end-to-end interactions that drive value and satisfaction.



Foster a culture that succeeds through communication, execution and leading by example.



Promote an organization built on continuous improvement and adaptability.



Deliver solutions, systems and data that focus on delivering value.

Service catalogue creation

Formalize organizational change management

Redesign IT organization

Improve stakeholder relations

Enhance business value analysis for projects

Formalize organizational change management

Implement performance management

Add IT policies to meet gaps

Improve data quality using standards

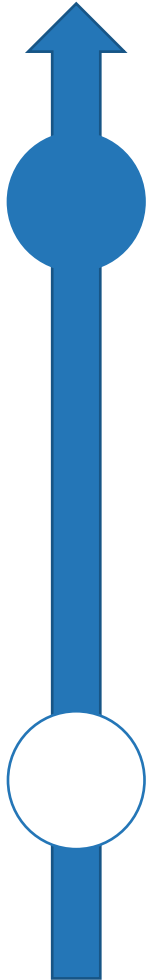
Enhance requirements gathering process

Establish data architecture practice

Establish enterprise architecture practice

Design security strategy

IT initiative profile assessment



Gaps and Omissions:

Initiative Profile Details

For each IT initiative:

- ✓ There is an indication of required budget, whether it is actual or estimated.
- ✓ There is an individual accountable for the initiative.
- ✓ The business benefits are summarized for the initiative.
- ✓ The dependencies are summarized.
- ✓ The risks to the organization are summarized.

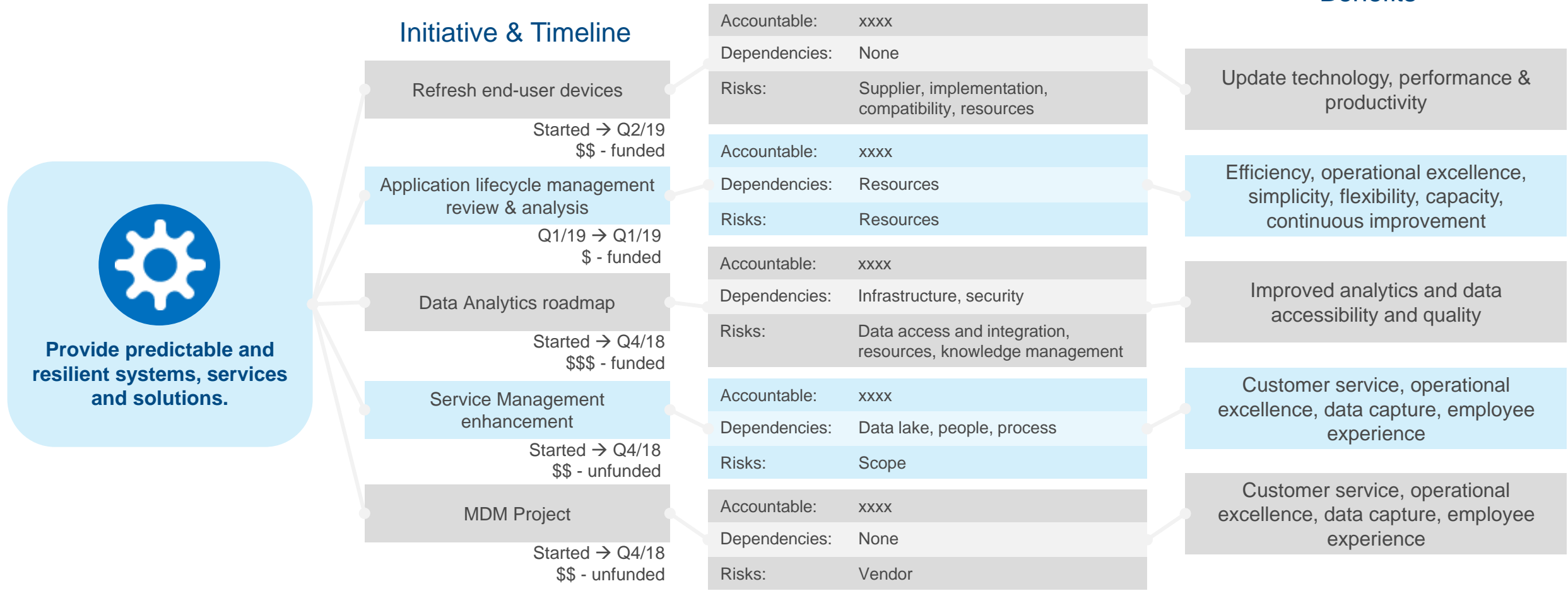
Initiative Profile

- ✓ There is an IT initiative profile for each IT goal identified.
- ✓ There are least three IT initiatives linked to an IT goal in the initiative profile.

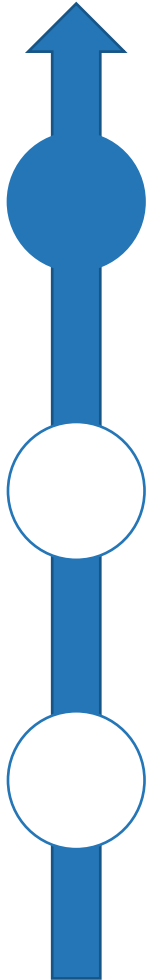
Recommendations:

- The IT initiative profiles in the IT strategy provide all the details in an ideal IT strategy.
- It is not clear which IT strategies are linked to the IT goals in the initiative profile. It is recommended to depict this linkage clearly.
- Refer to section 3.9 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Future IT initiatives to IT goals example



IT initiative prioritization assessment



Gaps and Omissions:

Prioritization Quality

- ✓ There are at least 20 IT initiatives that are prioritized using the method outlined in the IT strategy.
- ✓ The priority of each IT initiative can be easily explained by the IT team.

Prioritization Criteria Clarity

- ✓ There are clear criteria laid out for prioritizing IT initiatives.
- ✓ There at least two criteria used to prioritize IT initiatives.

IT Initiative Prioritization

- ✓ A method of prioritizing IT initiatives is evident in the IT strategy.

Recommendations:

- The prioritization methodology presented by the team in the IT strategy is easy to explain and meets other criteria.
- Refer to section 3.10 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

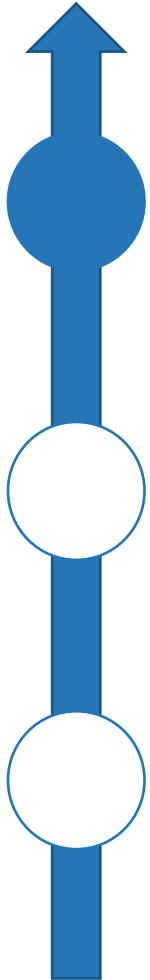
IT initiative prioritization example

The IT initiatives were prioritized against the Five Business Goals, each weighted according to IT's potential impact.

Prioritization Criteria	Weighting
Criteria #1	20%
Criteria #2	15%
Criteria #3	25%
Criteria #4	10%
Criteria #5	30%

Initiative	Priority
Data Analytics roadmap	1
Enterprise architecture tool assessment	2
Refresh end-user devices	3
Service Management enhancement	4
MDM Project	5
IT recruitment process review	6
Service desk software & asset management tool upgrade	7
ERP assessment	8
Application lifecycle management review & analysis	9
Engagement of 3rd parties for learning and training	10
Call centre upgrade	11
IT culture review with senior leadership	12
Review of intake process for business projects	13
Review of intake process for IT projects	14
Current industry memberships identification	15
Tool and vendor evaluation for testing automation	16
IT strategy rollout to IT team	17
Job shadowing within IT and between IT and business	18
Reward program for IT employees	19
Quarterly updates at executive meetings	20
Website refresh	21

Roadmaps assessment



Gaps and Omissions:

Roadmap Quality

- ✓ The roadmap is easy to understand and demonstrates the execution schedule of initiatives.
- ✓ There is a separate roadmap outlining the execution of critical IT initiatives vs. non-critical.

Roadmap Details

- ✓ The roadmap outlines distinct start and end dates of initiative execution.
- ✓ Each initiative on the roadmap is linked to the business or IT goal that it supports.
- ✓ The roadmap contains at least 10 Initiatives.




Roadmap

- ✓ There is a roadmap that depicts the execution schedule of IT initiatives in the IT strategy.

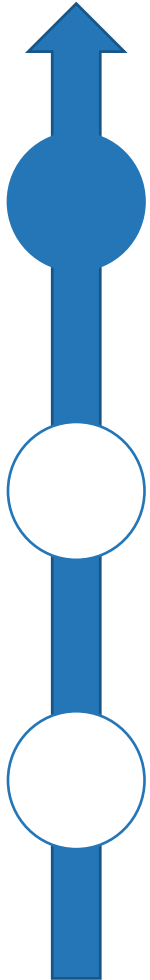
Recommendations:

- The roadmap provided in the IT strategy has most, if not all the characteristics of an effective roadmap.

Roadmaps example

IT Goal	Initiatives	2018	2019				2020				Ongoing
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
 <p>Provide predictable and resilient systems, services and solutions.</p>	Refresh end-user devices	■	■	■							
	Application lifecycle management review & Analysis		■								
	Data Lake	■									
	Service Cloud	■									
	MDM Project	■									
 <p>Create seamless end-to-end interactions that drive value and satisfaction.</p>	Call center upgrade		■	■							
	Website refresh	■	■	■	■	■	■	■	■	■	
 <p>Foster a culture that succeeds through communication, execution and leading by example.</p>	IT strategy rollout to IT team	■	■								
	Job shadowing within IT and between IT and business		■	■	■	■	■	■	■	■	→
	Reward program for IT employees		■	■	■	■	■	■	■	■	→
	IT culture review with senior leadership		■	■	■	■	■	■	■	■	→
	IT recruitment process review		■	■	■	■	■	■	■	■	→

Future IT budget assessment



Gaps and Omissions:

Future IT Budget Quality

- ✓ Each newly brainstormed IT initiative has a budget estimation that can be traced to the "future IT budget required."
- ✓ The future IT budget required is broken down for each IT initiative in the time horizon of the IT strategy.

Future IT Budget Details

- ✓ There are high-level calculations that show how the numbers were arrived at.
- There is a visual representation of the change in budget from the current fiscal year to the future IT budget.

Future IT Budget

- ✓ There is a "future IT budget required" section in the IT strategy.

Recommendations:

- There is a future budget estimation for all IT initiatives.
- There is no summary of the collective budget required. It would be helpful to have this number.
- There is also no visual representation the change in budget from the current state and the target state.
- Refer to section 3.12 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Future IT budget example

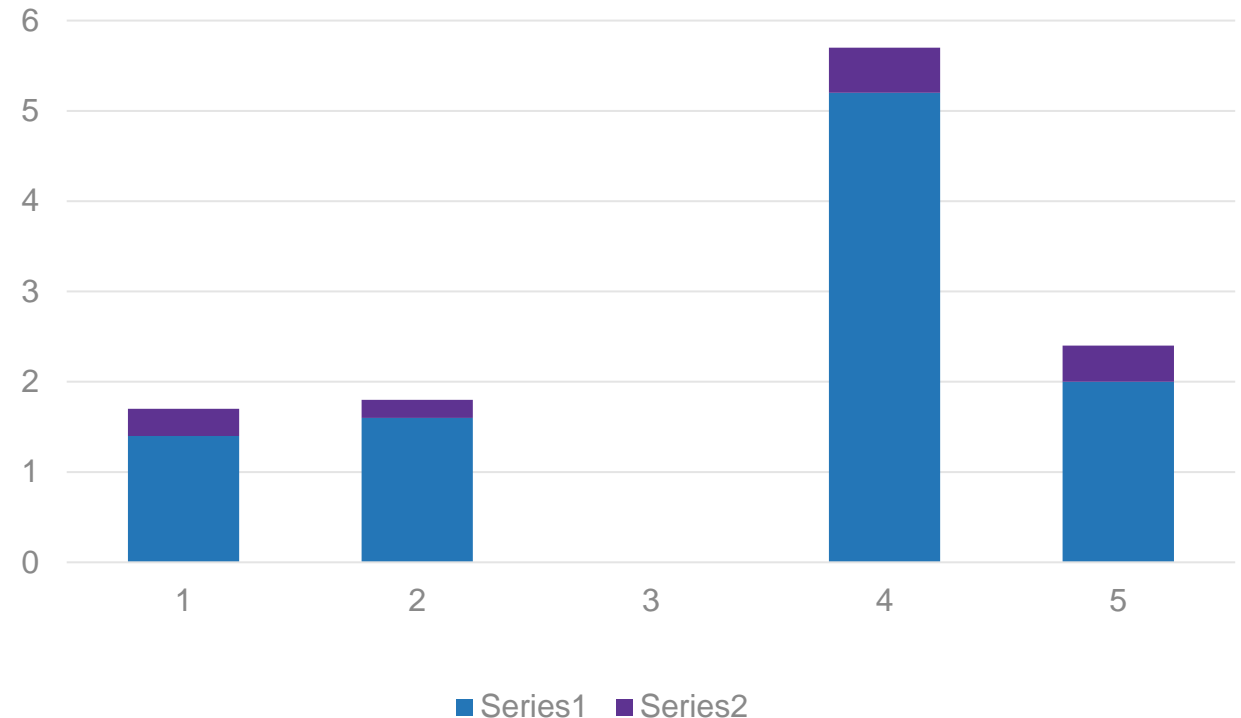
2018 – CapEx \$1.6 million, OpEx \$4.1 million

- 2018 OpEx includes \$1.8M in salaries, \$1.0M for SW and HW maintenance, \$500k for telephony and data, and \$500k for consulting

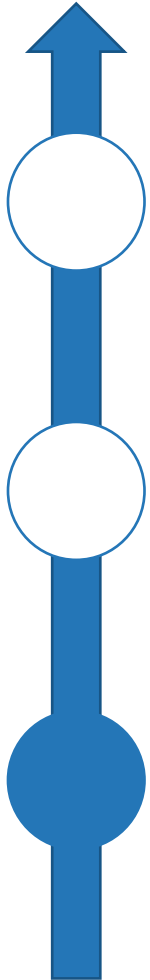
2019 – CapEx \$2.0 million, OpEx \$5.2 million

- 2019 OpEx includes \$2.2M in salaries, \$1.0M for SW and HW maintenance, and \$800k for consulting

IT Budget (Millions)



Communication plan assessment



Gaps and Omissions:

Roadmap Quality

- There is an outline of the message that is needed to be communicated to each group.
- There are deadlines to communicate the information to each group.

Communication Plan Details

- There are separate audience groups delineated in the communication plan.

Communication Plan

- There is a communication plan in place with the purpose to communicate the IT strategy and/or changes to the IT strategy.

Recommendations:

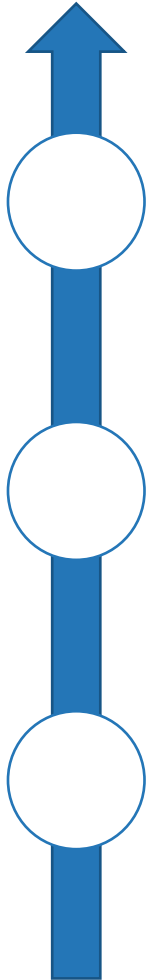
- There is a communication plan in place. Unfortunately, there are not any separate audiences delineated in the Communication Plan.
- Delineate the different groups that need to be communicated to and define the key message that to each group.
- Refer to section 3.16 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Communication plan example

In order to ensure that **XXXX's** IT strategic plan is clearly communicated across both the IT and business organizations, the following rollout strategy was developed.

Audience	Channel	Level of Detail	Description	Timing
IT Management Team	Email, Meetings	All	<ul style="list-style-type: none"> Distribute plan; solicit feedback Address manager questions to equip them to answer employee questions 	Q4 2018, (October, before entire IT team)
IT Team	Email, Q&A sessions following	IT summary deck	<ul style="list-style-type: none"> Roll out after corporate strategy, in same form of communication Solicit feedback, address questions 	Q4 2018 (late November)
Select business stakeholders	Presentations	Executive deck	<ul style="list-style-type: none"> Pilot test for feedback prior to Executive engagement 	Q4 2018; early December
Executive Team	Email & Briefing	Executive deck	<ul style="list-style-type: none"> Distribute plan 	Q1 2019

Refresh plan assessment



Gaps and Omissions:

Refresh Plan Quality

- Each trigger outlined shows which portions of the IT strategy will be refreshed.
- The audience involved in the refresh is clearly defined.

Refresh Plan Details

- The refresh plan outlines triggering events that will begin a refresh of the IT strategy.

Refresh Plan

- There is a section in the IT strategy that addresses how often the IT strategy will be refreshed.

Recommendations:

- There is not section that addresses how often the IT strategy will need to be refreshed.
- Refer to section 3.17 in the blueprint Rapidly Develop an IT Strategy for instructions on how to complete.

Refresh plan example

The IT strategic plan is not meant to be a static one-time review, but rather an evolving roadmap that continues to align with business and industry needs. To this end, the following refresh plan was established.

Frequency	Audience	Scope
Annually	Business stakeholders, IT	<ul style="list-style-type: none">• Re-survey• Review / validate strategy
Quarterly	IT management team	<ul style="list-style-type: none">• Initiatives status updates• Business updates• New projects• Risks / constraints• Changes in priorities• Updates
Every 3 years (2021)	Senior management IT leadership	<ul style="list-style-type: none">• Full Planning