The IT Strategy Management Process

Supporting IT Services Through Effective Knowledge Management

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Colophon

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Introduction

Background and Applicability

During the1980s and the early ’90s one manufacturer’s computers dominated data centers around the world. At the time, information technology (IT) was thought to be something complex, and difficult to direct and manage. Looking back on those days, it appears it was relatively simple.

Today, corporate and government organizations are faced with a large variety in IT choices, technology changing at an incredible speed and ever-increasing complexity. For medium and large companies, these factors alone create enormous challenges, and yet it isn’t IT that matters. What matters is the well-being of the business function supported by IT, the speed at which the business function can be adapted to new developments and how quickly innovation can be brought to market. In effect, the agility with which an enterprise adapts to changing market conditions can be key to its survival.

Because of the importance of agility, the company that more effectively manages its IT is in a better competitive position. An important piece of the puzzle are the structures to direct and manage IT in an optimum way while positioning it for quick – but smooth – changes.

Typically, processes and quality management systems (QMSs) provide structure to better direct and manage complex IT environments. Most well known are those processes defined under the umbrella of ITIL® (IT Infrastructure Library), which is published by the Office of Government Commerce (OGC) in the United Kingdom. Among others, ITIL outlines the processes for service level management, configuration management, problem management, change management, availability management and capacity management.

These processes and related QMSs bring structure into most parts of the data centers, and may describe the processes for application development organizations and for the central IT organization. However, they are insufficient to address the complexities of the relationships needed between the many processes, organizations, departments and locations. Complexity leads to complications such as confusion, unnecessary cost and delays, as well as project failures. Obstacles resulting from independent departments, cultural differences, country barriers and so forth may further complicate things. Something is needed to “glue” them together at a fundamental level. This publication addresses that issue and attempts to meet this objective:

Provide the fundamental structures that continuously push for creating, using and executing well-balanced, smart, complete and up-to-date IT Directives[1] and solutions throughout corporate and government organizations.

This objective may look ambitious, because it may suggest the need for extensive integration into organizations and processes - which makes implementation a high-risk project. The IT Strategy Management Process avoids extensive integration by keeping the solution as simple as possible while positioning it as a lead process to other processes and to organizations. Moreover, this publication describes the critical pieces to a level that helps IT management, process specialists and senior technical staff understand what is required to *make things happen.* Special attention is given to practical aspects such as human interaction. Through this approach, it may not be obvious that this is, indeed, a process. However, it does meet the ITIL criteria for process.

The objective further implies that the process must cover more than what is traditionally understood by "strategy". The scope of the IT Strategy Management Process (itSMP) includes implementation instructions to the strategies. Hence, directions, standards, guidelines, best practices and so forth are in scope.

Other Areas

As the IT Strategy Management Process was being developed, the following question was raised many times: "Can this solution be used for all sorts of documentation – such as for knowledge management, intellectual capital and risk management – instead of only the rather limiting scope of IT?"

In principle, we expect the itSMP can be applied to areas other than IT, as it only concentrates on the most fundamental structures. There also is the possibly of using it between corporate and government organizations. These other areas will have slightly different needs that have not yet been investigated.

[1] Strategies and their implementation instructions such as directions, standards and so forth

Chapter 1 – Today's Challenges

In the introduction, we briefly touched on the challenges surrounding IT. Gaining high-level perspectives of the predominant IT challenges is a good starting point.

Major IT Challenges

The Technology Side

Need for up-to-date technology guidance that fits locally

Large choice of technology

Extremely high technology change rate

Technical versus business needs

Ever-increasing complexity

Constant year-round need for application availability – 24 hours a day, 7 days a week, 365 days a year

The Organizational Side

Execution of IT strategies over the obstacles coming from independent organizations, countries, languages and cultures

Local versus country versus company wide needs

Executing the decisions of virtual teams in a hierarchical organization

Keeping many organizations and processes connected with each other

The Human Side

Need to stay current with the latest IT developments

Need for technicians to understand both processes and business functions

Translation of the vision and mind power of the top technical leaders into highly effective Directives and IT solutions

Objectivity

Acceptance of ongoing change

The Commercial Side

Agility – the ability to change and transform as the market demands; speed, adaptability and performance

Competitive pressures

Cost control – inclusive hidden cost

Short, medium and long-term needs

Figure 1: Challenges

The real difficulties, however, don't come from the individual challenges but from their combination and the resulting complexities. For example, as applications are linked and their up-time requirements move toward 24x7x365, the opportunities to upgrade hardware or software are dramatically reduced. Meanwhile, IT vendors eliminate support of older products, and competition demands urgent upgrades to the business function, requiring IT to adapt quickly. The whole is further complicated by cost-saving initiatives, viruses,

immature software/hardware and so forth. This leads to the following question:

What fundamental structures must be in place for IT to be directed and managed across the enterprise in a way that delivers optimum value?

The first step to finding the answer is to understand the root causes and underlying issues that may exist. There are a number of possibilities:

Root Cause 1: Too many repositories
Multitude of different Web places and repositories to use
Different look and feel to each repository
Unclear applicability of content
Unclear importance of content
Lost trust in repositories

Root Cause 2: Documentation quality
Lack of documentation standards
Unsuitable wording and document structures for compliance verification
Insufficient background information to understand why the strategy makes sense
Out of touch with user needs
Outdated material
Insufficient information about the document's current status
Lack of technological guidance
Lost trust in documentation

Root Cause 3: Lack of process between development and production
Confusion resulting from the lack of integration between development and production processes and organizations
Organizational changes creating confusion between development and production
Unclear approval process
Bureaucracy for company wide approval needs
Conflicting directions or solutions from different organizations
Inadequate structures to ensure needs and feedback are trusted and properly prioritized
Disregard of important feedback from local to central organizations
Excessive filtering of technical needs as they go through the management chain
Broken communication chains
Unrealistic non-compliance instructions, forcing everyone to ignore them
Disregard of compliance instructions
Lack of compliance verification
Control mechanisms timed too late in an approval process

Root Cause 4: Information overload
Root cause 1+ Root cause 2 + too many internal Web pages + too many external Web pages + too many e-mails
Web search functions delivering too many hits to find and act on the proper ones
Inability to distinguish the "relevant" from the "irrelevant" information

Root Cause 5: Cultural differences
Many different cultures
Time and effort required to effect culture change
Expectation that one's culture will work in foreign cultures
Insufficient time to properly review and agree on Directives and solutions
"Not invented here" syndrome
"Silo" solutions
Lost "lessons learned"

Root Cause 6: Lack of investment
Central organization projects perceived to be of insufficient value
Central organization cuts due to insufficient value
Lack of investment in IT solutions
Insufficient budget to solve root causes
Insufficient resources to address issues
Lack of investment in people and skills

Figure 2: Root causes and underlying issues

Following is an illustration of the root causes. Development organizations and development processes try to connect to their counterparts in the production organizations. On the other hand, the production organizations and production processes try to connect to their counterparts in development. The bridge connecting development and production is not suited for easy crossing. The number of direct relationships needed may be too high or other issues from Figure 2 may be the reason. Plus, there are additional pressures such as cost savings that lead to productivity improvement projects and external customers whose needs must be met.

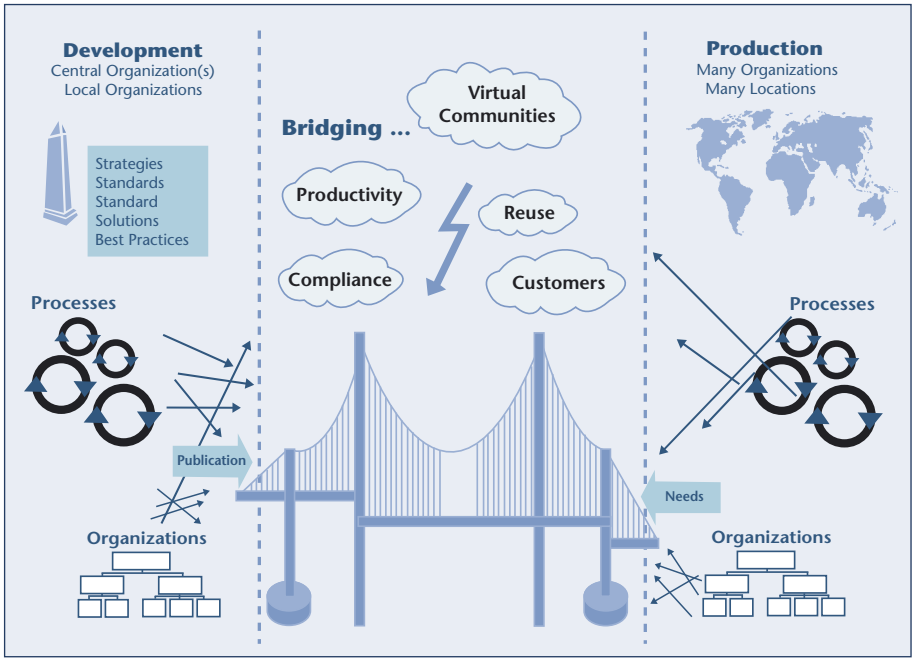

Figure 3: Development and production trying to connect with each other

At this point, let's ask several ambitious questions:

- Wouldn't it make business sense if several of these root causes would be largely solved?
- Wouldn't it make business sense if the company's intellectual capital would be captured and translated into policies, strategies, directions, guidelines, standard solutions, etc., and pushed for execution throughout the enterprise?
- Wouldn't it make business sense if safety nets were provided so issues with policies, strategies, directions, guidelines, standard solutions, etc., were visible to the users and corrective actions triggered?
- Wouldn't it make business sense if the solution to the previous questions were kept simple?

Although a "yes" answer to each question seems ambitious, this is what the IT Strategy Management Process is designed to achieve.

Chapter 2 – The Solution

When looking into the root causes and underlying issues, it appears many of them touch on IT technical documentation in some form. Additionally, it appears documentation is the *vehicle* to communicate Directives and solutions. Thus, it makes sense to have the solution be built around IT technical documentation. However, there is more to it. It is not merely a matter of creating documents that are then ignored. The solution must be brought to the level at which "things happen." This requires it to be more than a document management system and more than instructions on how to write the documentation. On the other hand, it must be simple enough to avoid complexity and associated issues.

The proposed solution is a process with structures connecting processes, organizations, departments and locations with each other at a *fundamental* level. To avoid heavy and complex integration needs, the solution acts as a lead process: It takes output from processes and organizations, and makes it available to other processes and organizations. It is independent of organizations and consists of a simple set of ground rules, a trusted central repository and a few other elements necessary to make things happen.

The IT Strategy Management Process approach is similar to ITIL processes, while attempting to avoid as much of the theory as possible. It is positioned to complement the official ITIL processes but can also act independently. Further, it fits well under the umbrellas of knowledge management and intellectual capital: It pushes certain knowledge and intellectual capital out of people's mind into Directives or standard solutions, which then are not only promoted but pushed for usage or execution.

Introducing this type of process implies that organizations recede slightly into the background, though they continue to function and deliver output such as strategies, research reports and standard solutions. Actually, outputs of central organizations should be improved, because they should better meet the needs of the target audience. On the flip side, it becomes easier for the target audience, which does not need to understand internal matters of the central organizations. Matters such as, "Is the strategy still up-to-date," "What are the current issues with the strategy," "How are the latest politics," and so forth are taken over by the process or moved to the background. What matters is that the target audience – the internal customers – get Directives, standard solutions and so forth that *can be trusted on an ongoing basis*. The process provides this and other functionality. In fact, trust is a deliverable of the Strategy Management Process. Let's clarify the term "directive." A technology directive (referenced as "Directive" in this book) is any official policy, strategy, direction, guideline, standard, etc., from which compliance is expected across departmental or process boundaries. It is IT-related or related to a process directly supporting IT in the company. This includes quality management systems.

The itSMP must have some fundamental elements. First, a single repository or a definitive document library is needed to hold the official IT documents. Given the complexity of IT and the enormous rate of change, there is also a lot of pressure to better connect subject matter experts (SMEs) with each other, to management and to other employees. In addition, there are passionate people who form a group that can get a topical area moved forward at little or no cost.

To support and encourage those groups, structures must be established and embedded into decision-making. These structures will be referred to as the ”technical community.” However, a repository and a technical community are insufficient to deliver value over the obstacles that come with language issues, different countries, different organizations and cultures. Something is missing – something that makes people do things because they like it. This will be called ”incentive techniques.” Yes, “incentive” sounds expensive. To overcome this, one requirement is that incentive techniques provide more value than they cost – which is preferably no cost at all.

Figure 4 illustrates the fundamental structures the itSMP provides to connect development and production. Additional structures outside the scope of the process can be built on top of this foundation to strengthen the bridge. There are two huge advantages with this approach. First and foremost, the itSMP can be kept relatively simple and low-cost. Secondly, add-on solutions can take advantage of the foundation, which reduces their cost and reduces the risk of ending up in situations as illustrated in Figure 3.

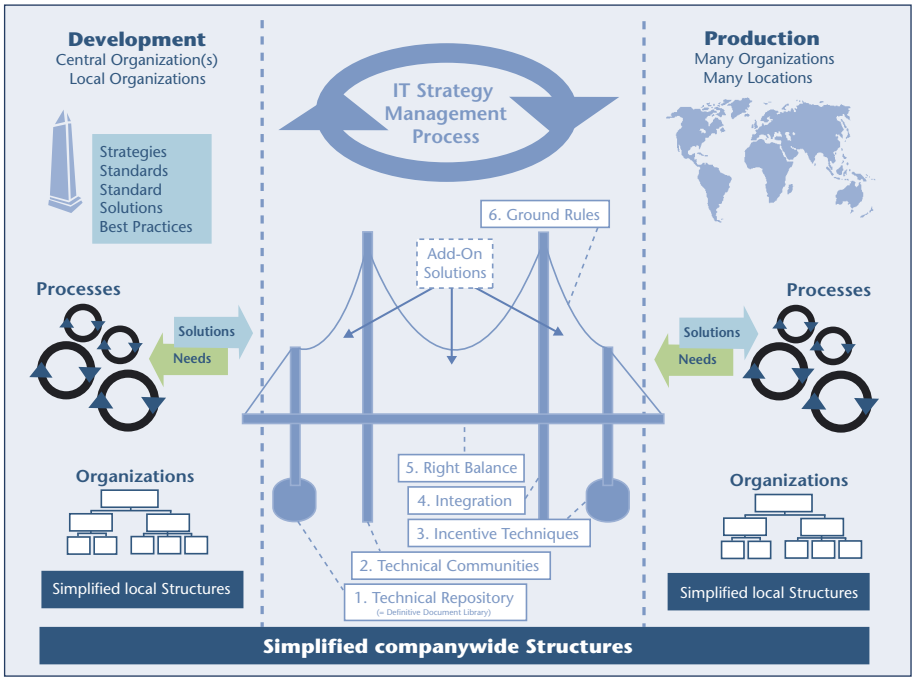

Figure 4: The IT Strategy Management Process and its elements

It appears a little bit more is needed than the three elements mentioned previously. If they would stand in isolation, things would probably improve somewhat, but not to the level at which the optimum value can be provided. A high level of integration between the elements also is needed. For example, although one can define a repository as the trusted source of information, it doesn't mean the users accept it as such. It is different if the community – which represents the users – reviews documents and provides feedback through the repository, and document owners have incentives to solve identified issues throughout.

Another critical element is the right balance. For example, too much involvement of local organizations in the approval of company wide Directives probably will create a situation in which the Directives are outdated by the time they are released. Too little involvement means the Directives might not be executable locally, possibly requiring expensive re-engineering. It's a matter of finding the right balance.

Lastly, there is the element of "ground rules." The ground rules tie the whole together in the working environment. They simply describe how the other elements work and how things are to be done throughout the process. Moreover, they are not only available through some process document read by few people but are published as top-level Directives. Because the ground rules contain many answers to fundamental questions, colleagues enterprise

wide will use them repeatedly and direct others to them.

The itSMP covers all organizations using IT documentation and those that create Directives and standard solutions for other organizations. The process encompasses the complete circle – from the Directive or standard solution request over approval and execution of the Directive to feedback, update, execution of the update and archiving – across organizations and process boundaries. It drives development processes/organizations to develop the Directives or the solutions. It drives production processes/organizations to execute the Directives or to implement the solutions.

Organizations that may have tried to develop their own solutions to this functionality can now leave it to the Strategy Management Process. In fact, some initiatives that would otherwise fail may become highly successful because they can take advantage of readily available fundamental structures. For example, a project could be started to collect and internally publish the intellectual IT capital of a company. But the itSMP doesn't stop at publication; first, it pushes for the translation of that knowledge into Directives. Once published, it pushes for their execution across the company. Finally, it pushes to keep the intellectual capital and Directives current.

Moreover, output of the itSMP provides important input for several of the ITIL processes; other processes, projects or needs. Additionally, people working on new IT projects find answers to fundamental technology questions, speeding up time to market. Audit can do compliance checking against the official Directives stored in the technology repository. The educational department can check the repository to see whether certain courses should be offered or avoided and so forth.

Chapter 3 – Benefits of the IT Strategy Management Process

How itSMP contributes in Overcoming the Root Causes

Now let's review the previously listed root causes and see how the itSMP contributes. First we need to introduce "traffic lights" and "Dashboard." Green, yellow or red bullets, referenced as traffic lights, provide an indicator as to the status of a document or can be used for priority-setting in connection with new documentation requests. For an example, see Figure 16 and Figure 17. The Dashboard is an executive-level overview reporting the quality of the repository content (see also Figure 20). It is based on the traffic light information. Moreover, the following symbols are used to illustrate the expected status after a full implementation of the process:

- ✓ Solved
- (✓) Largely solved; may be impossible to solve completely
- (☑) Partially solved
- Add-on solutions, outside the scope of the Strategy Management Process, can be built on top
- ((🔔)) Pushes for solutions within or outside the Strategy Management Process

Root cause 1: Too many repositories			(✓)
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Multitude of different Web places and repositories to use	One trusted central repository		✓
Different look and feel to each repository	One look and feel		✓
Unclear applicability of content	Repository dimension defines applicability		✓
Unclear importance of content	Tiered structure and compliance flag for each document Other process elements provide additional trust		(✓)
Lost trust in repositories	One repository only Traffic lights List of known issues		(✓)

Root cause 2: Documentation quality			(✓)
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Lack of documentation standards	One standard format for all Directives Repository structure pushes for certain content in certain documents Through traffic lights and the Dashboard, corrective actions are triggered as issues surface	No format for specific documentation, for example, regarding a solution. However, the need for this is drastically reduced.	(✓) ((🔔))
Unsuitable wording and document structures for compliance verification	One "use" and "avoid" -type format for all Directives Directive verification/fast-track approval pushes for proper instructions Through traffic lights and the Dashboard, corrective actions are triggered		(✓) ((🔔))
Insufficient background information to understand why the strategy makes sense	The Directive format pushes for this kind of information Through traffic lights and the Dashboard, corrective actions are triggered if needed	Lack of writing, culture or language skills of those having the knowledge	(✓) ((🔔))
Out of touch with user needs	Fast-track approval pushes the developers to connect with those in the field from the beginning Through traffic lights and the Dashboard, the process pushes for corrective actions as issues surface	Budget, skills and resources for non-trivial needs	(✓) ((🔔))
Outdated material	Automatic aging triggers corrective action through traffic lights and Dashboard The aging status is shown in the repository	Budget, skills and resources for non-trivial needs	(✓) ((🔔))
Insufficient information about the document's current status	Traffic lights plus instructions in the repository show reasonably current status information.	Delays in updating the status information	(✓)

Root cause 2: Documentation quality (continued)			(✓)
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Lack of technological guidance	Directive format pushes for the creation of this information Request feature through the repository and Dashboard push for technology guidance	Budget, skills and resources for non-trivial guidance development	(☑)  
Lost trust in documentation	One repository + traffic lights + corrective instructions as appropriate within the repository		(✓)

Root cause 3: Lack of process between development and production			(✓)
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Confusion resulting from the lack of integration between development and production processes and organizations	The itSMP provides one common structure, linking development and production Disconnects are likely to show up in the Dashboard, triggering corrective actions	Management issues (budget, risk taking, politics, etc.)	(✓) 📌
Organizational changes creating confusion between development and production	The fundamental process structures remain intact; it is a matter of getting the new organization connected to the itSMP As confusion surfaces, it can be expected that this shows up in the Dashboard, which triggers corrective actions	Management issues (budget, risk taking, politics, etc.)	(✓) ((🔔))
Unclear approval process	A fundamental approval structure		(✓) 📌
Bureaucracy for company-wide approval needs	Tries to achieve the right balance – as much as needed, as little as possible		(✓) 📌
Conflicting directions or solutions from different organizations	This is likely to show up in the Dashboard, triggering corrective actions		(✓) ((🔔))
Inadequate structures to ensure needs and feedback are to be trusted and properly prioritized	Community structures empower the feedback Traffic lights and the Dashboard trigger corrective actions		(✓) ((🔔))
Disregard of important feedback from local to central organizations	Consistent follow-up takes place through the Dashboard		(✓) 📌

Root cause 3: Lack of process (continued)			(✓)
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Excessive filtering of technical needs as they go through the management chain	Direct links of technicians and SMEs through the technical community Embedding of SMEs in decision-making Traffic lights and the Dashboard trigger corrective actions		(✓) ((🔔))
Broken communication chains	Through the repository self-registration feature, everybody can register for automatic notification of updates to the repository. Excuses such as "did not know" become unacceptable.		✓
Unrealistic non-compliance instructions, forcing everyone to ignore them	Non-compliance approval is delegated to the appropriate level, filtering out only important matters for higher-level approval		(✓)
Disregard of compliance instructions	With root causes largely solved, this issue becomes much smaller Compliance verification		(✓)
Lack of compliance verification	A matter of building it into few but crucial places Non-compliance feedback through the community structures		(✓)
Control mechanisms timed too late in an approval process	The need for control mechanisms becomes insignificant		(✓)

Root cause 4: Information overload			(☑)
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Root cause 1+ root cause 2 + too many internal Web pages to use + too many external Web pages to use + too many e-mails	One 3-tier documentation structure with common usage and handling instructions One format for all Directives Automatic aging Status flags and corrective instructions at document level Corrective action triggering from status flags Consistent usage through structures embedded in crucial places of other processes and decision-making	Tier-4 documentation (operational documents, etc.) Tier-5 information (e-mail, communication bulletins, etc.) Out-of-scope information	(☑)
Web search functions delivering too many hits to find and act on the proper ones	Easy repository navigation through scope limitation, repository entry pages and integration of individual documents into document sets.	Out-of-scope information	(☑)
Inability to distinguish the "relevant" from the "irrelevant" information	One 3-tier documentation structure The Directive format distinguishing less important Directives from more important Directives and from other information Document status flags listing current status Involvement of the user community	Out-of-scope information	(☑)

Root cause 5: Cultural differences			(☑) + 🖈+ ((🔔))
The itSMP accepts that a culture-change project is extremely difficult and takes a long time, but it asks the question, "Is there a simple solution to make things happen anyhow?" The key features used are: • Motivating colleagues to act because they like it. This usually is done through incentive techniques (for example, quick approval if the investment or project is compliant with the Directives; strong business case otherwise) • Aligning to human nature and human interaction as much as possible (for example, one repository) • Providing one simple set of ground rules for everybody • Heading for the right balance; avoiding extremes • Providing a safety net that triggers corrective action (traffic lights + Dashboard + incentive techniques)			
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Many different cultures	Common ground rules, incentive techniques and instructions for incentive techniques Issues in relation with technical documentation are expected to show up in the Dashboard, triggering corrective action.	Cultural differences are a fact of life	(☑) 🖈 ((🔔))
Time and effort required to effect culture change	Incentive techniques (make people do things because they like it)		(✓) 🖈
Expectation that one's culture will work in foreign cultures	This is likely to show up in the Dashboard, triggering corrective action.	Many years of international work experience needed	(☑) 🖈
Insufficient time to properly review/agree on Directives and solutions	A matter of sufficient and high enough incentive techniques	Other priorities, budget, etc.	(✓) 🖈
"Not invented here" syndrome	A ground rule, built into crucial places; for example, "Is the project/investment compliant with the content of the technology repository?" Solution verification Incentive techniques		(✓) 🖈

Root cause 5: Cultural differences (continued)			(☑) + 📌 + ((🔔))
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
"Silo" solutions	Solution verification Those solutions are likely to show up in the Dashboard, triggering corrective actions	Budget, skills and resources	(☑) ((🔔))
Lost "lessons learned"	Issues listed in the document status in the repository contain many lessons learned. They show up in the Dashboard, triggering corrective actions. The document format pushes for lessons learned to be provided with the Directives.	Budget, skills and resources for non-trivial corrections	(✓) 📌 ((🔔))

Root cause 6: Lack of investment			(☑) + ((🔔))
Issues	**itSMP Provides**	**Issues Left**	**Expected Status**
Central organization projects perceived to be of insufficient value	This issue is a logical consequence of the previous root causes. Through their resolution, trust is re-established and these issues become much smaller. Through the Dashboard, evidence is provided to support budget and resource assignments.	Funding Time gap until central organization can prove value and trust is re-established	(☑) ((🔔))
Central organization cuts projects because of insufficient value	(See previous row)	Funding Time gap until central organization can prove value again	(☑) ((🔔))
Lack of investment in IT solutions	(See previous row)	Funding Time gap until confidence in investments is regained	(☑) ((🔔))
Insufficient budget to solve root causes	In contradiction to many projects trying to solve the same issues one by one, the Strategy Management Process provides one solution to common needs. The cost should, therefore, be a fraction of the "many projects" alternative.	Funding	((☑))
Insufficient resources to address issues	The itSMP is relatively simple, requiring few resources The Strategy Management Process is expected to free up resources	Funding Time gap until resources become available	((☑))
Lack of investment into people and skills	Through the Dashboard and for the development side, evidence is provided in support of such investment	Funding Recruiting Education Investment needs at the production side	((🔔))

Figure 5: IT Strategy Management Process impact on root causes

Other Benefits

Let's look into some benefits that may not be obvious from the previous sections.

- The technical leaders' intellectual capital is not only pushed for internal publication but also for translation into Directives and standard solutions. They are then pushed for execution throughout the company.
- For many IT projects and activities, approval or disapproval can be much quicker, as many answers to fundamental questions will be readily available from the Directives. In some cases, detailed research or evaluation information also might be available. "Reinventing-the-wheel" projects become less likely.
- The central repository also provides a place to store project-specific solutions, architectures and so forth for reuse on other projects. Once in the repository, the solutions are immediately available for re-use. For example, if a solution is to become a company standard, it can be requested through the feedback structure or directly by initiating the approval procedure of the process.
- For service excellence and service level management, the output from the itSMP provides the technology Directives on which service expectations and agreements are based. If the Directives aren't available, they can be requested through the technical community. The process pushes for their creation.
- itSMP Directives have an educational value, as smart information is made available through the Directive format. It particularly pushes for use/avoid-type instructions and background information.
- Rather than pointing to different Web pages with varying levels of reliability, auditors can simply point to the repository as a reliable source of information from which compliance is expected.