Agenda

Introductions
What is your context?
Big picture visioning
What is your current state?

Break 9:30-9:55

Morning Review
Gap analysis for roadmap planning
Communicating the Strategic Plan
Measure Progress
Wrap-up and comments
Our goals for today...

- **Construct** a strategic plan that incorporates data and ties to institutional goals
- **Develop and manage** a process for continuous improvement of your IT strategic plan
- **Communicate** your IT strategic plan effectively to multiple audiences
- Start to **apply** this knowledge to your own strategic planning projects
Table Introductions (<1 minute each please!)

➔ Name - Title - Institution
➔ What is the current state of strategic planning (IT and institutional)?
➔ Why are you here today?
What is Strategic Planning all about?

CONTEXT: what are the drivers and triggers to the future
VISIONING: where do we want to be in the future
CURRENT STATE: where are we now
GAP ANALYSIS: Analyzing issues
STRATEGIC PLAN: how to get to that future; COMMUNICATING the plan and MEASURING progress
Why is understanding CONTEXT important?

CONTEXT: what are the drivers and triggers to the future

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Drivers or Event Triggers

- Changes in institutional strategy
- Changes in institutional leadership
- Technology shifts
- Technology misalignment
- IT capability assessment
- Near-term events
- Funding models
- Governance and changing Governance Models (John)
Permutations

- New IT Strategic Plan from scratch
- Institutional plan, but no IT plan
- IT plan, but no institutional plan
- Inherited strategic plan
- IT plan is integrated with the institutional plan
- No history of strategic plans in IT or across the institution
What is **Your** Context?

*Sherri*
ACTIVITY: Table Discussion - Drivers

● Are there drivers/event triggers not listed?
  Changes in institutional strategy, institutional leadership
  Technology shifts, technology misalignment
  IT capability assessment
  Near-term events
  Funding models
  Governance and changing Governance Models

● What drivers/events exist at your institution?

● Report out by table
Data

● What data is relevant to your context?
  ○ Text, numbers, pictures, video
  ○ *Quantitative* where possible
  ○ *Qualitative* to explain
  ○ *Both* to show impact and value!

● Examples
  ○ Leadership timeline
  ○ Technology shifts
  ○ Education shifts
What does this data example show us?

- Historical context of leadership of theses universities
- History of change
- Possible issues:
  - Culture
  - Resources
The Internet circa 1975
What does this data example show us?

- Technological trends
- Current state
- Issues
  - Complexity
  - Resources
Context Data

● What data is relevant to your context?
  ○ Text, numbers, pictures, video
  ○ **Quantitative** where possible
  ○ **Qualitative** to explain
  ○ **Both** to show impact and value!
  ○ Don’t forget **anecdotal data**

● Examples
  ○ Leadership timeline
  ○ Technology shifts
  ○ Education shifts
  ○ Other examples relevant to your situation...
Where does VISIONING fit in?

CONTEXT: what are the drivers and triggers to the future

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Big Picture Visioning
Cindy
What is a Vision

- A vibrant, engaging, specific picture of your organization when the vision is achieved
- A vision is clear and compelling, acts as a unifying focal point, and a catalyst for the organization
- A vision applies to whole organization, but teams should have their own too

Vision is your desired future
Some important Strategic Planning Words

A mission statement is a statement of an organization's reason for existence: Its purpose and intention.

New England College is a creative and supportive learning community that challenges individuals to transform themselves and their world.

A vision statement looks forward and creates a mental image of the ideal state that the organization wishes to achieve.

New England College emphasizes experiential learning as an essential component in the development of an enduring academic community. Building upon a strong liberal arts foundation, we challenge our students to reach their full potential through informed discourse and the pursuit of excellence in a framework of academic freedom that reflects the following values [...]

Vision or Mission?

... Information Technology Services provides excellent infrastructure, support, and innovation in the delivery of information technology products and services to enable and empower the university constituency.

Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis.

ITS partners across the college to deliver technology and services which empower and inspire.
Vision or Mission?

Information Technology Services provides secure, reliable, and integrated technology solutions in alignment with academic and administrative goals, while delivering excellence in customer service.

To offer designer eyewear at a revolutionary price, while leading the way for socially conscious businesses.

Information Technology Services will be recognized as a high performance team providing technology excellence that advances learning, teaching, research, and student formation in alignment with Boston College’s mission and goals.
More Important Strategic Planning Words

**Strategies**
Strategies are one or more ways to use the mission statement in order to achieve the vision statement.

**Goals**
Statements of what needs to be accomplished to implement a strategy.

**Objectives**
Objectives provide specific milestones with a specific timeline for achieving a goal.

Credit to: Iowa State University Extension and Outreach
Vision

ITS partners across the college to deliver technology and services which empower and inspire.

Goal

Transition from homegrown and on premise solutions to third party cloud solutions.

Objective

Reduce by 50% the estimated 100 homegrown solutions by December 31, 2020.
How do I Create a Vision?

- Project 5 to 10 years into the future
- Dream big and use the present tense
- Inspirational: Infuse it with passion and emotion
External Inputs

- Technology and service trends
  - Educause (CDS, ELI, Top Ten!, HEISC), NACUBO, AIR, AGB
  - Colleagues, professional associations

- Educational trends
  - Globals experiences, IoT, digitization, open education resources, adaptive learning, assessment, student success

- Policy/legislative trends
  - ADA, diversity/equity/inclusion, GDPR, state or federal mandates/regulations
Institutional Inputs

- Inputs from the institution - environmental scan
  - What is the institutional mission? vision?
  - What is informing the mission, vision of your institution, department
    - geography
    - socio-economic issues
    - educational needs, aspirations
    - service quality
  - What is the institutional strategic plan?
Inputting the inputs

- Research and reading
  - include others’ vision statements!

- Relationships
  - open, collaborative partnerships with
    - colleagues and students across your institution
    - Listening--be deliberate
  - encourage idea generation, dreaming

- Iterative
Visioning: Getting Started

A way to start...

● What is your first thought for a vision?  Go big! Put something down?
● List two things you know that led you to this first-thought vision.
● What steps do you need to take to develop this vision?
  ○ List five actions you can take to start this process.
What is Your Current State?

John
Why is CURRENT STATE data important?

**CONTEXT:** what are the drivers and triggers to the future

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Current State

Present set of circumstances....

Exists only from an individual's interpretation...

Fictional environment from the past....

Conceptual...can never be achieved....

...Does not exist....
Current State

It is difficult to set your direction if you do not know where you are?

- Current State must be tied to organizational honesty.

- Current State must be meaningful.

- Current State must be business as usual.
What Data Do You Capture?

Are you finishing or executing an existing strategic plan?

What meaningful metrics do you capture?

What data do you routinely share?

What data do you routinely receive?
What does it mean?

Types of Services
Operational Procedures
Standards
Governance
Useful Operational Metrics
Human Resources
Policies
Budget
Organizational Alignment

Infrastructure/Technologies
Collaboration
Cost Savings
Security
Experiences
End user Feedback
Peers
Maturity of Services
Innovation
Expectations Management

High Expectations

- Lagging: OK
- Standard: OK

Low Expectations

- Leading Edge: OK
- Visionary: OK
Meeting Expectations

Does your organization have established expectations for IT performance (Qualitative, Quantitative)

Are you meeting those expectations? Why?

Did you ever have the opportunity to set those expectations?
University of Montana...defining their current state

“We engaged with hundreds of stakeholders over a four-month period to define current state and clarify challenges related to our charge. Our guiding principles……represent much of what IT users and IT professionals said they want and need. Foremost, users want to be empowered by technology, and they need an IT organization willing and able to be partners in providing solutions and serving the University as a whole. IT professionals express the need for clear priorities on workload issues and support for professional development.”
Goal When Complete

Shared understanding of your environment

- Agreement on data collected
- Strengths
- Weaknesses
- Fit with expectations

Starting point for future directions
** BREAK **

PLEASE BE READY TO RE-START
AT 09:55am
Recap of Morning Session
(Audience Participation!)

Jerry Grochow
Gap Analysis

Jerry Grochow
Where does GAP ANALYSIS fit in?

- CONTEXT: what are the drivers and triggers to the future
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What is Gap Analysis about?

- Where does the current state need to go to meet the future state? How big is “the gap”?
- What are the key issues?
- What data do we need?
- What are constraints to accomplishing the change in state?
  - Funding
  - Personnel
  - Regulatory issues
  - Compliance issues
  - Cultural issues
  - Others?
VISION: Modern campus network

CONTEXT: Network has evolved over many years.
        Budget is limited.

FUTURE STATE: Need modern equipment and facilities to support teaching and research.

CURRENT STATE: Mixed old and new environment.
CURRENT STATE
FUTURE STATE  vs  CURRENT STATE
EXAMPLE

FUTURE STATE vs CURRENT STATE

55 vs 210
300 vs 0
What does this example show is?

• Current state
• Driver: Technological trend
• Issues:
  – Size and complexity of network
  – Resources: monetary and physical
• Does this presentation of the issue “resonate with the audience?” How can we make it better?
Where do you want to be on the “technology leadership” scale?

Visionary
Leading Edge
"Standard"
Lagging

Office Computing  Academic Computing  Research Computing  Administrative Computing
Where do you want to be on the “technology leadership” scale?

Visionary
Leading Edge
"Standard"
Lagging

Office Computing
Academic Computing
Research Computing
Administrative Computing

Tech Area
Technology Leadership Scale - Future

- Visionary
- Leading Edge
- "Standard"
- Lagging

Office Computing | Academic Computing | Research Computing | Administrative Computing

Current State | Future State

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What does this example show us?

- “The Gap”: Current State vs. Future State
- How do we determine the issues in changing states?
- How do we go about analyzing the issues?
  - *First, collect data!*
- What data do we need to collect to focus the discussion?
What does this example show us?

- “The Gap”: Current State vs. Future State
  - Biggest in academic computing
- How do we determine the issues in changing states?
  - Surveys, focus groups, external review
- What are the issues in this case?
  - Culture of decentralization
  - Financial resources
  - Leadership?
- What data do we need to collect to focus the discussion?
ACTIVITY: Current State / Gap Analysis

➔ List three areas where your current state is (significantly) different from the desired future state.

➔ List two issues in getting from current to future state for each area.

➔ List data you can collect to help in presenting the current state and the gap (issues)

➔ Report out: most significant gap and issues
Communicating and Measuring

Kirk
There is still lots more to do!

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Reasons Strategic Plans Fail

Poor Communication

Failure to measure/monitor and provide feedback
Co-creating change

Leadership still set the strategic direction and objectives, but collaborates (co-creates) with all of the organization how to get there.

“People will naturally support what they have been involved in creating.”

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
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<tbody>
<tr>
<td>Telling/ selling</td>
<td>Co-creation</td>
</tr>
<tr>
<td>Stakeholder management</td>
<td>Collaboration</td>
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<tr>
<td>Project delivery</td>
<td>Facilitation</td>
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<tr>
<td>Control</td>
<td>Empowerment</td>
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<tr>
<td>Linear change process or methodology</td>
<td>Dynamic, iterative change</td>
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"Communicate Early and Often" - Zig Ziglar

Most people's communication

What people think is "too much"

Actual good communication
Thomas Smith wrote a guide called Successful Advertising in 1885.

“People must see an ad 20 times before they will purchase a product.”
Communications

Address Everybody

- Early Adopters
- Mid Adopters
- Change Adverse
Variation and engagement

Communication in the digital age also demands **variation and experiences** that drive engagement.

Even museums are adopting **digital platforms** to explore new ways to communicate with and engage visitors.

Antwerp Museum: Apple iBeacon technology applied to classical art
Communicating

Vary the Medium

● When people hear the same message from multiple directions, it is more likely to be heard and remembered.

● What are the ways you could communicate a strategic plan at your institution?
Communicating

“Facts alone seldom persuade and rarely inspire” - Ron Crossland
Work on storytelling & use terms they understand
Why stories work

fMRI shows that when a person is watching a story, their brain doesn’t look like a spectator, it looks more like a participant in the action.[1]

Good storytelling drives change, because the brain changes when a person is curious, is predicting what will happen next and is emotionally engaged. [2]

Stories enable human collaboration

“Sapiens rule the world, because we are the only animal that can cooperate flexibly in large numbers. We can create mass cooperation networks, in which thousands and millions of complete strangers work together towards common goals [...] The real difference between us and chimpanzees is the mysterious glue that enables millions of humans to cooperate effectively.

This mysterious glue is made of stories, not genes.”
-Yuval Noah Harari
Story Examples
Goals
<table>
<thead>
<tr>
<th>Specific</th>
<th>Measurable</th>
<th>Attainable</th>
<th>Relevant</th>
<th>Time-Bound</th>
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<tr>
<td>Make sure your goals are focused and identify a tangible outcome. Without the specifics, your goal runs the risk of being too vague to achieve. Being more specific helps you identify what you want to achieve. You should also identify what resources you are going to leverage to achieve success.</td>
<td>You should have some clear definition of success. This will help you to evaluate achievement and also progress. This component often answers how much or how many and highlights how you’ll know you achieved your goal.</td>
<td>Your goal should be challenging, but still reasonable to achieve. Reflecting on this component can reveal any potential barriers that you may need to overcome to realize success. Outline the steps you’re planning to take to achieve your goal.</td>
<td>This is about getting real with yourself and ensuring what you’re trying to achieve is worthwhile to you. Determining if this is aligned to your values and if it is a priority focus for you. This helps you answer the why.</td>
<td>Every goal needs a target date, something that motivates you to really apply the focus and discipline necessary to achieve it. This answers when. It’s important to set a realistic time frame to achieve your goal to ensure you don’t get discouraged.</td>
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“Increase user satisfaction by 2020”
“Increase IT Helpdesk user satisfaction score from 80% to 90% by July 1st, 2020”
“By July 1st, 2019, our IT Helpdesk Net Promoter Score will increase by 10 points by reducing call waiting time by 50% through training and process changes.”
ACTIVITY:

➔ Start with a simple goal example
  ◆ *Improve IT Campus-wide Reputation*

➔ Make it a SMART goal

➔ Indicate how you will communicate on your campus

➔ Communication frequency? What will work on your campus? Think about Thomas Smith Successful Advertising

➔ Report out
The Feedback Loop

Feedback has always been part of organizational learning, but what all the modern frameworks for development/innovation (like Lean/Agile and Design Thinking) show is the need to incorporate it more broadly, frequently, and quickly:

- Small increments / Incorporate learning cycles along the way
- Don’t wait until the last minute to ask people what they think
Summary

CONTEXT: what are the drivers and triggers to the future

VISIONING: where do we want to be in the future

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What are your next steps?
Next steps

• Finalize your understanding of your
  – Context, vision, & current state
  – Identify what data elements help tell that story
• Establish your vision
• Mind the Gap
  – Identify where you are vs. where you want to be
  – What data elements tell both sides of those areas?
• Communicating your plan
  – Identify your SMART goals
  – Define your communication strategies
Questions?
Please take a moment to evaluate this session
There are two ways to access the session and presenter evaluations

1. In the online agenda, click on the “Evaluate Session” link

2. From the mobile app, click on the session you want from the schedule > then click the associated resources > and the evaluation will pop up in the list