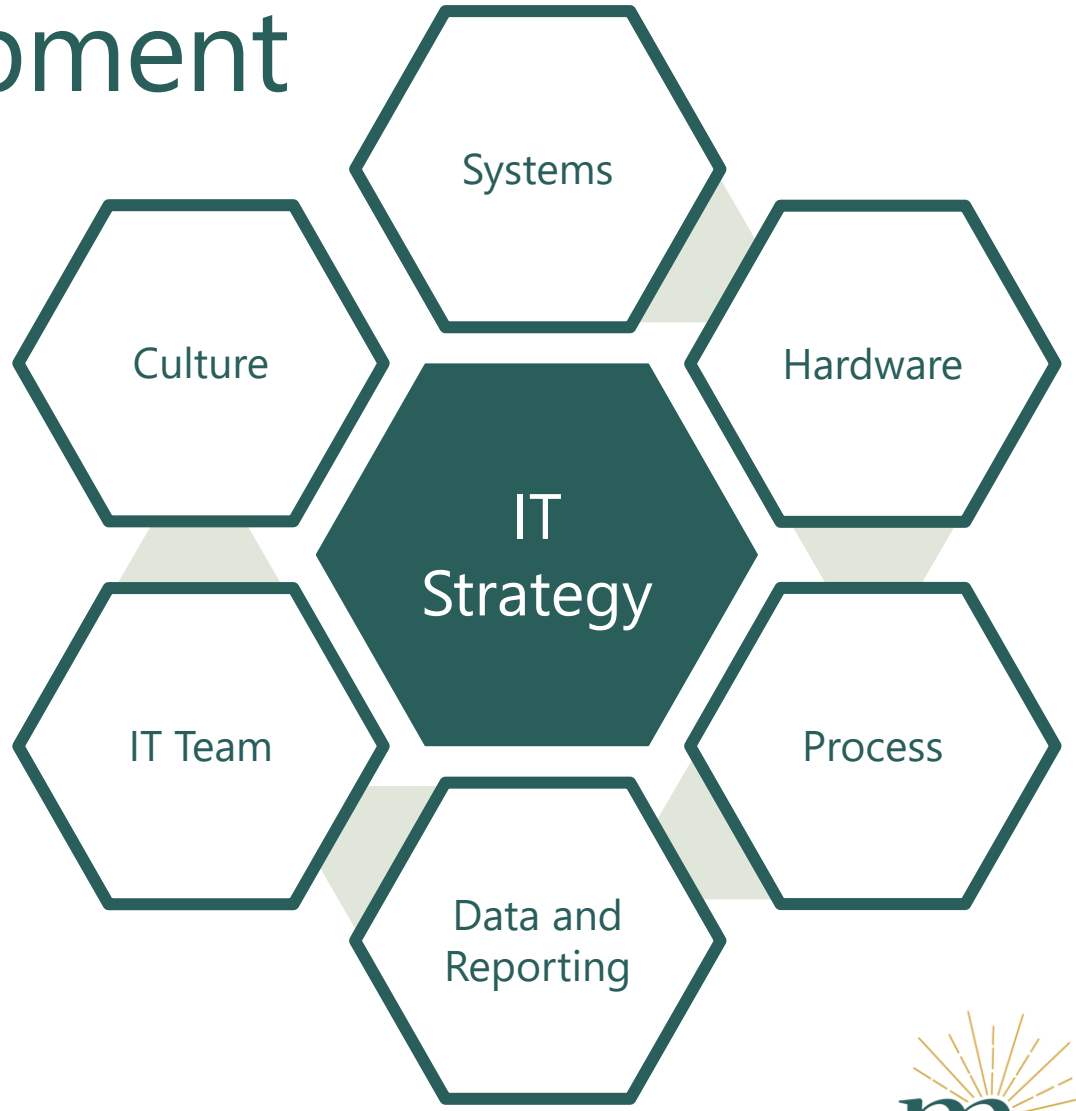
IT Strategy

Ensuring the systems, processes, team, and architecture is in place to run your business smoothly and securely.

IT Strategy Development

- Analyze areas affecting IT
- Identify activities/changes to close gaps and capture opportunities
- Ensure activities align with and support strategic goals
- Define timelines and roadmap



SYSTEMS

Current State (CS) vs. Future State (FS)

Define CS

- Document in-use software including capabilities, uses, users, and annual costs
- Document required resources and update cycles to maintain existing software
- Identify known challenges and gaps through discovery sessions
- Review departmental business plans to identify software being deployed and scheduled to be deployed
- Document a holistic list of existing and planned-for software

Define FS

- Identify potential technology gaps and redundancies
  - Based on organization's Strategic Plans and Departmental Business Plans
- Identify system gaps (*see next slide*)
- Document required resources and update cycles to maintain potential software
- Document a holistic list of existing, planned-for, and potential software

SYSTEMS – Future State (Cont.)

Addressing Systems Gaps

Maintain a Software List

- Include system capabilities, usage, pitfalls, users, costs, contracts, and solution architecture
- Store systems documents including requirements, rationale, and other systems considered

Remove Security Concerns

- Eliminate high-risk systems (e.g. free systems or personal accounts in use)
- Define and communicate required security measures and policies to mitigate security risks related to technology

Assign System Owners

- One owner per software; see slide on *Owner's Responsibilities*
- Create and communicate Tech Ownership Policy and Documentation Standards

Address Redundant & Underutilized Systems

- Identify system current uses and additional functionality not in use
- Use a *Technology Adoption Methodology* to close technology gaps
- Remove redundant systems

SYSTEMS – Future State (Cont.)

Owner's Responsibilities

Vendor Management

- Invoice Management
  - Design and drive invoice payment process
    - When do invoices require Owner's approval?
    - When and how do invoices get paid?
  - Ensure invoices are recorded and align with the contract
- Contract Management
  - Ensure contract is in line with organisation's policies
  - Review contract prior to auto-renewal and expiration
- Vendor Review
  - Perform Risk assessment

User Management

- Design and drive user access
  - Which users need access?
  - How do users request access? How does it get approved?
  - Who adds and removes users?
- Perform yearly user review
  - Do users still need access?
  - Are the same number of licenses still needed?

HARDWARE

Current State (CS) vs. Future State (FS)

Define CS

- Review IT hardware in use including capabilities, uses, users, and costs
- Document resources and update cycles
- Identify known challenges and gaps through discovery sessions
- Review departmental business plans to identify hardware being deployed and schedule to be deployed
- Document a holistic list of existing hardware

Define FS

- Identify potential hardware gaps and redundancies
  - Based on Strategic Plans and Departmental Business Plans
- Document required resources and update cycles to maintain hardware
- Document a holistic list of existing, planned-for, and potential hardware

IT PROCESSES

Current State (CS) vs. Future State (FS)

Define CS

- Document CS processes surrounding the selection, adoption, and maintenance of technology
- Consider the following processes:
  - Technology Adoption
  - Hardware Management
  - Technology Training
  - Inquiry Management

Define FS

- Assess CS processes for opportunities to standardize and remove inefficiencies
- Define FS processes
- Review suggested FS processes with SMEs before finalization

DATA & REPORTING

Current State (CS) vs. Future State (FS)

Define CS

- Document existing integrations and data flows
- Identify known challenges and gaps through discovery sessions
- Review current reports and identify:
  - Business decisions supported by data
  - Data that's available but not easily accessible (i.e. data access challenges)
  - Data that is not currently available

Define FS

- Identify integrations, data sources of truth, and data flow requirements to support the future state IT ecosystem
- Document solution architecture
  - Include recommended integrations and pending new systems
- Identify required data changes and report gaps
- Implement data and reporting best practices (*see next slide*)

DATA & REPORTING

Best Practices

- Identify objective of each report:
  - Why does it exist, for whom, what decisions are made from each report
- Identify Key Performance Indicators measured using the report
- Define report requirements
- Identify data sources of truth
- Determine data unique identifiers (if data pulled from multiple systems)

- Track all data that informs decisions
- Document what is being tracked, where, by whom, and in what format
- Understand the calculations to determine report outputs
- Create reports to pull data automatically
- Create dashboards to support head office and branch/facility-level decisions
- Use reports/dashboards to inform decisions
- Use reports to prove out ROI and build business cases

IT TEAM

Current State (CS) vs. Future State (FS)

Define CS

- Document CS IT Organizational Chart
  - Develop personnel RACI through job description reviews and discovery sessions
- Identify known challenges and gaps through discovery sessions
- Review team knowledge, skills, and abilities

Define FS

- Define a FS IT Organizational Chart
  - Include a RACI, covering both internal IT resources and 3rd-party support resources
  - *Check out our RACI development tool*
- Incorporate future considerations regarding succession planning

Technology Culture

Technology Culture speaks to the mindset of individuals towards the role that technology plays in the success and operations of the business.

TECHNOLOGY CULTURE

Technology culture impacts:

- The role that technology plays in the organization
- How communication regarding technology is performed
- How specific technologies are selected and put into use

Companies with a mature tech culture:

- Consider technology adoption from a holistic perspective
- Seek technologies that meet overarching, strategic objectives
- Seek vendors who share common values

TECHNOLOGY CULTURE

Current State (CS) vs. Future State (FS)

Define CS

- Identify known challenges and gaps through discovery sessions

Define FS

- Identify intended future state mindset surrounding digital strategy
- Identify cultural changes that might be required to help facilitate a digital transformation and how those changes could be driven
- Identify change management activities to realize the future state

IT STRATEGY

Create an IT Strategy

Define Activities & Create Roadmap

- Compile activities identified through analysis
- Identify additional activities required to meet future overarching strategic goals
- Create a Roadmap
  - Organize activities by order of completion
  - Identify timelines and accountable parties
- Complete activities per roadmap
- Periodically analyze IT influences and update IT Strategy

Example Roadmap

Activity	Owner	Due
Update Asset list	IT Lead	QX 202X
Document Solution Architecture	IT Lead	QX 202X
Define Network & Security Requirements	IT Lead	QX 202X
Create Emergency Operations Plan for Cybersecurity Attacks	IT Lead	QX 202Y
Define Data & Reporting Requirements	Business Analyst	QX 202Y
Create Team RACI and job descriptions	IT Lead	QX 202X
Implement Technology Adoption Process	IT Lead	QX 202X
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