

MEIRA

Consulting

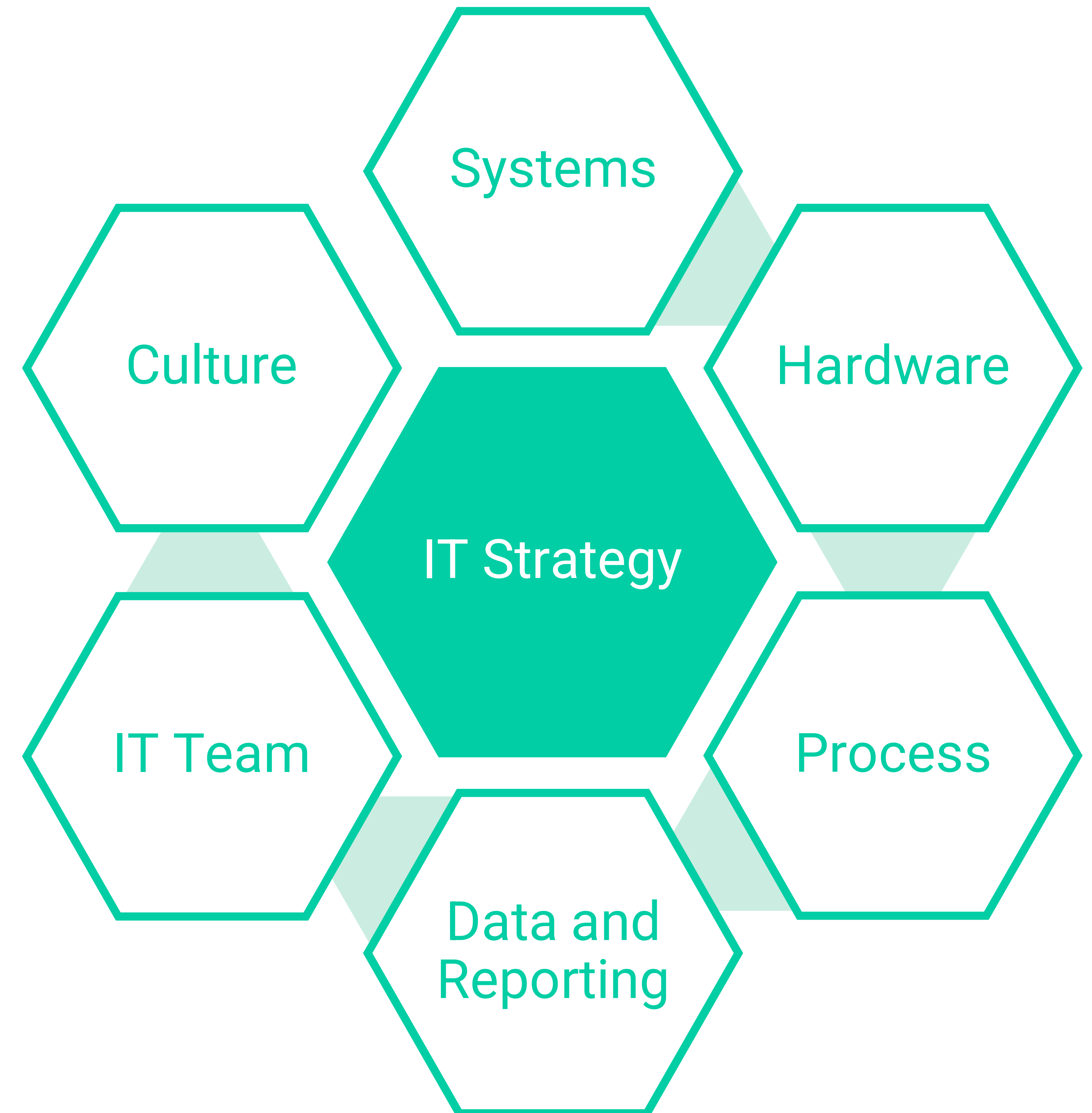


## IT Strategy

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 or changes to close gaps and capture opportunities
- Ensure activities align with and support strategic goals
- Define timelines and roadmaps



# 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 – 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 – 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
- 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	Date
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 202X
Define Data & Reporting Requirements	Business Analyst	QX 202X
Create Team RACI and job descriptions	IT Lead	QX 202X
Implement Technology Adoption Process	IT Lead	QX 202X

