How do we communicate technology with impact and urgency?

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Perceptions and Realization

- Network World – Secret IT audit to evaluate CIO & IT Director
- Vendor advertising and direct sales pitch to organizational leadership
- Ads - O'Hare Airport Billboard – "Are your IT Nerds Turds?"
- "Having a team of programmers and engineers as talented as we do is like a bad addiction. I hate it." **Chief Financial Officer**
- "Your team makes it so easy for us to make a sweeping change and affect so many things in this organization. When we make a bad decision, we hit the golf ball so far off the fairway. "**Chief Operations Officer**
- "We must find a way to communicate. I do not like being angry at a group that works as hard are your team does." **Vice President of Finance**
- "I know your IT team can make a brick fly, I just need to know how much it will cost me and how long it will take." **Vice President of Sales**
- My IT department has some of the best and hardest working employees in the organization, am I the only one who knows?

Common IT Leadership challenges supporting business operational technology - External

- Limited time in front of the right people to create a clear understanding for non-technical business units.

- Inability to convey technical topic to the business units, in a non-technical manner.

- Lack of communication, planning, and lead time coming from the business units.

- Ego and vanity projects forced upon your team – "It's quick and easy!"

- Having no vision or leaders who can (or will take the time to) give you understanding of business need.

- Sometimes being invited or having a seat that the adult table.

Common IT Leadership challenges supporting business operational technology - Internal

- Limited head count – *Improve how we pitch to hire more.*

- Supply training for the IT team and ensure cross trained IT employees for backfill

- Keeping talented technology employees motivated. High potential employees with limited opportunities for growth. – *Demographics & Patience*

- Manage increase in technology (and security) requirements and its rapid growth throughout the organization.

- Increase in customer and/or vendor integrations - Expanding convergence across multiple systems and platforms.

- Speed of the business need to exploit the large amounts of data created every day. (Perishable and Non-perishable- Edge computing)

Step out of our daily grind, remove our blinders, and spend time to try and bridge the gap between technology and our people?

IT Leadership

- We must understand the core business challenges and initiatives and then make our IT progress visibly overlay those initiatives.

- More than our technical abilities, we are the storyteller for the IT tools and resources and must create a clear vision of what the business can do with our "blocks". 80%

- Allow business leaders to shape the vision into immediately impactful operational technology.

- Timing is key. We need to limit visibility early. Do not include them in the tool selection.

- We must be clear and able to communicate the "why" better than the "how".

- Technology for every problem exists and is available but nontechnical leaders need to trust IT and our execution to enable us to implement it. Be concise.

- Completely rip your IT budget discussions away from the "cost center" and the accounting mentality.

Think about this..

- Your elephant versus your rider
- Your rider has a natural inclination to search for problems to mitigate. (Only see the bad)
- Your elephant is frightened by uncertainty
- We must script the critical moves.
- What looks like resistance is often a lack of clarity.
- Your strategy is only as good as your ability to articulate it.
- Business leaders are bombarded with hundreds of decisions per day. This leads to decision paralysis and fatigue.
- Paradox of Choice – Every additional option in a decision reduces chances of choosing anything at all. Status quo is default.
- Each additional option requires 20% more think power from the decision.

Organizational IT awareness - Security

61% of employees admit they are willing to attempt to bypass IT policies and security controls to make their jobs easier.

Operational Users and midlevel managers DO NOT CARE most of the time. Do not affect the revenue engine or departmental directives.

Organizational IT awareness

Johari Window personal self-awareness model

Apply this your IT team inside of your business.
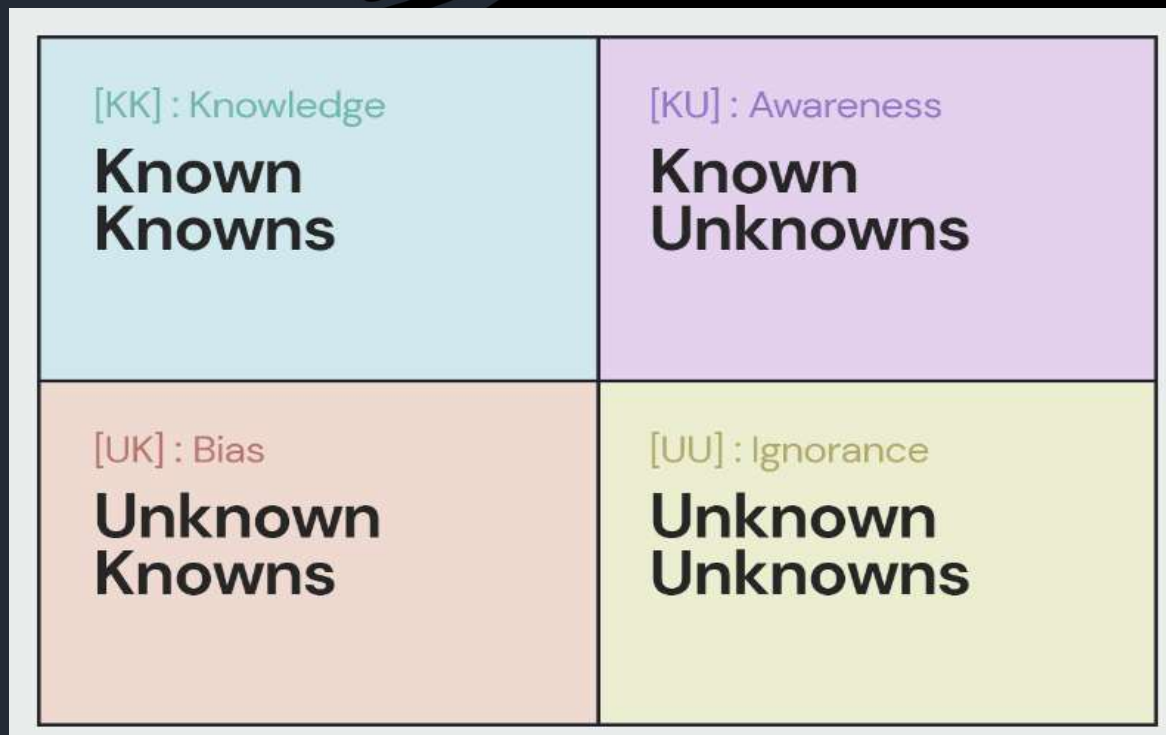
Organizational IT awareness check

Known-Knowns = Knowledge – INCREASE

- Technology is expensive, we spend XXX million a year on IT!
- Our company IT budget has increased by XX% year over year.
- Our computers cost more than what I can buy at a retail store.
- We know we need Cybersecurity. We see it on the news.
- Our systems are(or are not) reliable based on our uptime experience.
- We need to be able to quickly recover from a disaster.
- I know we need IT people.
- We need fast computers and internet.

Organizational IT awareness check

Known-Unknowns = Awareness – INCREASE (SHOW THEM)

- I know we need IT people, but what do all these IT guys do every day?
- I know I see the training budget but is my IT staff cross trained and knowledgeable on our technology?
- We do have a BCP but are we truly able to recover from a disaster? (Show them what IT owns is good)
- My IT teams seems good, how do I know that they are aligned with our initiatives?
- Are we on budget, and where are we either over or not managing our money?

Organizational IT awareness check

Unknown-Knowns = Bias - DECREASE

- Our IT team is good because we're doing the same things as our competitors. (We're in line, here's how)

- We haven't had a breach so security must be good.

- Our projects are mostly on time so we must be getting our monies worth.

- Why does my IT group sometimes over complicate solutions or problem fixes? (Tell them what you know)

- IT must be investing in the correct technology to drive business, we're still doing business.

- Does IT involve the business users in technology decisions? (If they listen)

- Are we paying a reasonable amount for solutions, could we do it cheaper? (Yes, you can always save money, do you want to save it and absorb the risk?)

Organizational IT awareness check

Unknown-Unknowns = Ignorance - DECREASE

- We assume we are using the best of breed applications.

- What applications do we truly need?

- Are we invested in technology that can move my organization forward?

- I don't like Heath; he is not a people person.

- Why is IT talking about security, it's their job to secure us against cyber threats.

- Are they telling me the truth when they say I can have only one item from QUICK, QUALITY, CHEAP? (Get in front of the buzz phrases)

- What do they mean that we are not fully utilizing systems and applications that we have purchased? (Key)

- Are my IT projects closely aligned with company objectives? (Easily show them)

- What is the correct head count? Don't they all do the same thing? (Will become apparent)

IT Project Discussion Framework

A – Major	B– Moderate	C– Minimal
1 – Easy Quick	2 – Medium	3 – Major

ABC123 Framework – Build your Impact grid

A Major -IMPACT (Projects, Applications, Actions)

- Move the dial for the entire organization or large organizational units within the organization.

- Can create a large impact on processes, work instructions, and efficiencies.

- Can build future technology foundations that may have even larger impact.

- Create visibility to otherwise unknown business impacting issues.

- Could increase exposure to security, and/or create additional expense to mitigate the risk.

ABC123 Framework – Build your Impact grid

A – Major

- Improve customer experience
- Reduce controllable expenses
- Immediate impact on increase in revenue
- Cybersecurity posture improvements
- Compliance gap improvement
- Network Infrastructure improvements
- Network continuity and efficiency gains
- Business process optimization

ABC123 Framework – Build your Impact grid

B-IMPACT (Projects, Applications, Actions)

- Move the dial for a smaller segment of the organization or exist at the departmental level.

- Can have some ambiguity amongst managers and directors who are involved with the ABC123 grid. (Not unanimous)

- Innovation for existing projects, applications, or inefficient user processes.

- Can have immediate short-term gains but may not sustain as an ongoing process or implementation. (Worth doing)

- Can have a minimal impact in the short term but result in more efficiency in the long run and sustain as a work instruction.

ABC123 Framework – Build your Impact grid

B – Moderate

- Resource optimization and training
- Management agility and reporting
- Monthly/Weekly insight & visibility
- Policy and work instruction improvements
- Recurring data checks & dashboards
- Innovation – user may not know what they need technically but bigger impact possible (augmentation of ask)

ABC123 Framework – Build your Impact grid

C-IMPACT (Projects, Applications, Actions)

- Move any dial very little, if at all and will only impact an individual manager or small group of employees.

- Can have little to no visibility, be a quick idea, or be a "that's what I thought" type of request.

- Have no real impact processes and work instructions.

- Be a quick and easy win for a manager only. (Communicate this)

- A Waste Of Time!

ABC123 Framework – Build your Impact grid

C – Minimal

- One off curiosity reporting
- Cosmetic environment changes
- Hardware shuffle/office moves
- Management vanity requests
- Basic helpdesk projects (> 1 hour)
- Tier 1 level request to Tier II IT resources (> 1 hour) PC , printer unjam, equipment orders
- Fixes to issues that are of minimal impact but the right thing to do (housekeeping)

ABC123 Framework – Build your Scope grid

3-SCOPE (Time, Money, Employees)

- Full scale IT projects that may require RFP and requires internal resources from one or more of the organizational units.

- Usually spans multiple weeks or months.

- Could set technology foundation direction.

- Require training investment for both IT and operational units.

- The typical IT projects that have ALL visibility and ALL conceived resources.

- Clear and on everyone's radar

ABC123 Framework – Build your Scope grid

3 – MAJOR

- Requires an outside vendor
- Requires IT resource investment for project management scope, dev, or infrastructure
- Multiple non-IT managed resources involved in decision making
- Implementation spans 100+ employees or requires travel and training at more than half of the facilities
- Multiple project champions and minimal executive buy in (untrusted champion)
- New tools, applications, or training required
- High potential for failure or abandonment

ABC123 Methodology – Build your Scope grid

2-SCOPE (Time, Money, Employees)

- Leverage application or technology already implemented and low visibility for senior management.

- Could be presented to IT leadership as easy and should be monitored closely.

- May require subject matter expert limitations which leads to more IT time.

- Could have a bigger impact but use your best judgement here. Will it?

- Consider all uncontrollable outside of your control that could kill or stall the project. It matters for a two.

ABC123 Methodology – Build your Scope grid

2 – MEDIUM

- May require an outside vendor or outsource dollars
- Mid/long term IT resource investment (>3 days)
- May require the purchase of application, tools, or time investment from all IT teams
- Time and input required for non-IT resources
- Project champion is unclear or may require approval across multiple divisions
- I know we do not need this.

ABC123 Methodology – Build your Scope grid

1-SCOPE (Time, Money, Employees)

- Low hanging fruit that everyone on your technical team identifies it as such (everyone wants in, or searches for their own).

- Less than one or two days to complete.

- Require applications that have already been running in the background or used in other areas of your organization.

- Builds excitement when the IT has a chance to utilize tools and applications that they enjoy.

- Is a very low lift for many if not all of your IT team.

ABC123 Methodology – Build your Scope grid

1 – EASY-QUICK

- No outside vendor requirements
- Utilizing existing IT investments, NO MONEY
- Knowledge of solution exists in ITD
- Utilizes previously purchased IT Tools/Apps
- Resource Investment < 1 day
- Limited scope and operational resource time
- Executive or Project Champion is clear with a complete understanding of the scope. You have good people.

ABC123 Methodology – Read the board and build your conversations

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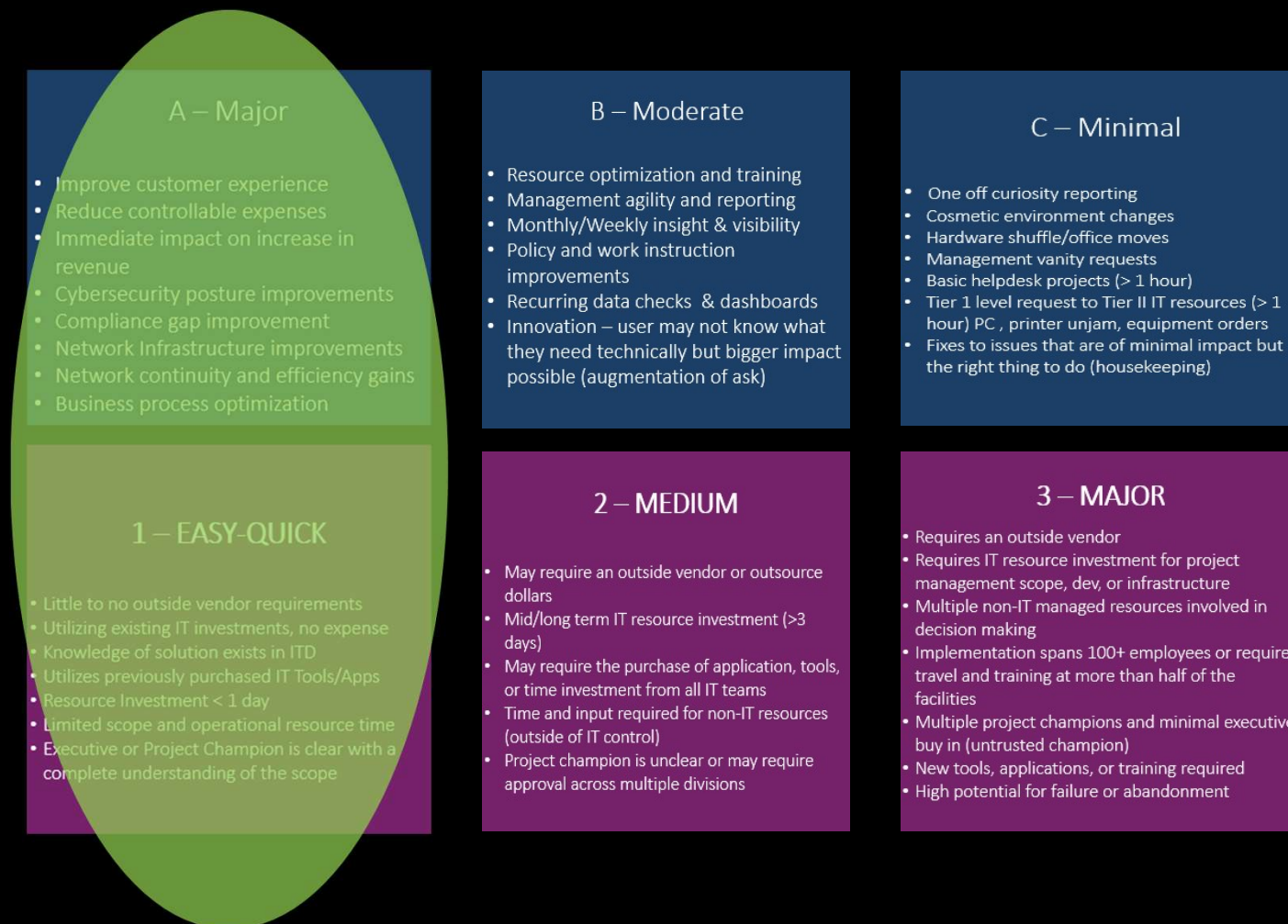- Executive or Project Champion is clear with a complete understanding of the scope

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ABC123 Methodology – Read the board

A1 (Why are we even talking about it?)

- IT Leader message to team, don't even ask. Do it

- Seen as huge wins across the board

- Keeps the involved IT resources engaged and excited. They want to make an impact that is seen

- Can truly affect all your key metrics that were ranked is critical or important the project in the A-Impact grid

- Allows IT leadership to maintain efficiency and productivity while reducing IT bias that may exist

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A2 (Maybe sneak?)

- IT Leader message to team, Let's have a talk first.
- Still seen as a huge win but may not be worth the cost depending on other IT projects (Mostly a go).
- Will continue to keep the involved IT resources engaged and excited but risks sprawl.
- Continues to affect all your key metrics that were ranked. Is critical or important to the project in the A-Impact grid but at a greater cost.
- Usually require monetary discussion for additional dollars.

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ABC123 Methodology – Read the board

A3 (On-going standard projects)

- Standard IT projects that are already visible, directed, and communicated frequently due to scope, cost, and high resource count.

- Generally, have a set direction by senior managers, senior IT leadership, and are driven initiatives through the organization.

- Can be strenuous, time consuming, and involve IT resources to a point where they will need a break. Refresh them and allow them to tackle an A-1 for a quick win.

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ABC123 Methodology – Read the board

B2 (Comfort Zone)

- A good variety of tools that you have already purchased and a reasonable amount of time to complete.

- Generally, do not need SME or resources out of IT and if you do, they are good.

- A very quick discussion and minimal amount of outside vendor support will be need. Can sneak under the budget radar. Still viewed as an IT win.
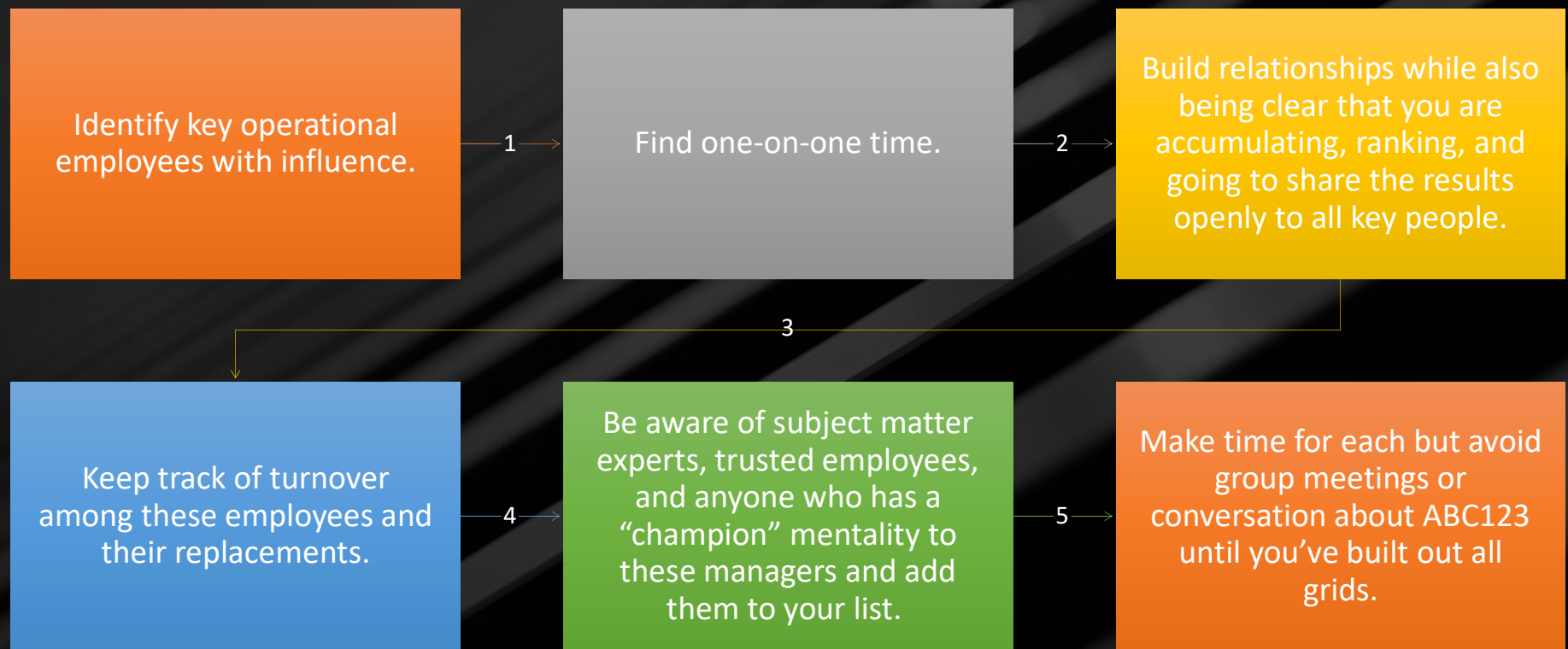
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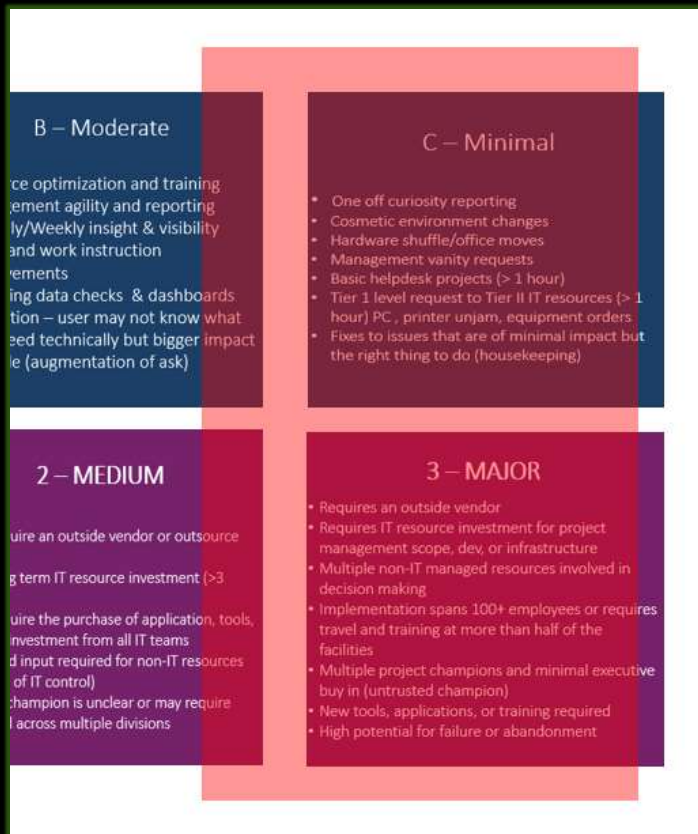
C3 (NO GO ZONE)

- IT Leader message to team, NEVER! Try to AVOID.

- Never worth the cost and if communicated clearly, should not make it on the project list at all..

- Will require clear and honest conversation with stakeholders to either bump rank, dismiss, or admit that there is no value

- Sometimes may be forced upon IT due to the level of leadership who have requested the project.

ABC123 Methodology – Find people to help

Identify key operational employees with influence.

1 →

Find one-on-one time.

2 →

Build relationships while also being clear that you are accumulating, ranking, and going to share the results openly to all key people.

3

Keep track of turnover among these employees and their replacements.

4 →

Be aware of subject matter experts, trusted employees, and anyone who has a "champion" mentality to these managers and add them to your list.

5 →

Make time for each but avoid group meetings or conversation about ABC123 until you've built out all grids.

ABC123 Methodology – Where to start for IT Leader

- Walk through all IT projects on your board, rank them and assign them.
- Create a grid for all functional categories of your IT responsibility.
    - Development
    - Cyber security
    - Network Operations
    - Helpdesk and Desktop Support
    - Operations and analytics
    - Research and Development

    Quantify and sum your ABCs. (Have conversations with stakeholders if you are unclear)

ABC123 Methodology – Where to start for Operations Leaders

- Walk through all initiatives in your Op Group and decide which category or ABC Grid to assign it. Communicate initiatives to your IT team.

- Create a grid for all departments and organizational units.

- (This is my Company)
  - Accounting
  - Finance
  - Retail Parts Operations
  - Retail Service Operations
  - Administrative and Senior Leadership
  - Marketing

  Quantify and sum your ABCs for all categories. DO NOT discuss details unless requested.

ABC123 Methodology – Shape your conversation

Too many A-3's on your board for Cyber Security

- Do we have a productivity problem in the group?

- Do we need more bodies?

- Is everyone working hard but just not able to keep up? If so, does management support the risk of not hiring.

- Are they not truly an A project?

- Are the operational units giving IT the required time to complete the project in it's projected time frame?

- Can I outsource or buy more tools?

ABC123 Methodology – Shape your conversation

Too many C2 – C3's being worked by your IT group.

- Do we have a productivity problem or employee who is camping in low level projects?

- Do we have a manager who is bypassing project IT leadership?

- Does your IT team have a clear understanding of the ABC123 principles?

- Is your leadership poor or have employees with a lack of respect for time and continuing to require the IT team to work low impact projects?

ABC123 Methodology – Shape your conversation

Corporate accounting has twice the A2.5 – B3.0 projects than any other organizational unit.

- Do we need more accountants?

- Do we need an intervention of managers with the Corporate Accounting Manager on his impact assessment?

- Do we need a new Accounting Manager?

- Do we need to escalate the ranking decisions above the department manager?

ABC123 Methodology – Shape your conversation

We have frequent disagreements on project ranking.

- IT Leader needs to better communicate the ABC123 rules
- Are we asking the right questions to the correct people and hitting the correct influencers.
- Is the organization leadership on the same page?
- Should we pause IT projects until leadership is on the same page with initiatives?

ABC123 Methodology – Shape your conversation

A Projects are bloated or delayed by a lack of SME or operational engagement or other delays in prioritization.

- Do we need to readdress the true impact of previously ranked A. Is it important to the organization?
- Do we need to completely reshape the entire grid for the affected managers?
- Did the IT Leadership under or over sell the scope?
- WE NEED MORE PEOPLE!

ABC123 Methodology – New conversations (Frequent assessment of your ABC123 leads to better IT Communication by default)

Too many A3's on your board in cyber group.

- Do we need more bodies?
- Do we have a productivity problem in the group?
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- Continue to build relationships and make sure you're hitting the correct influencers.

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Thank you