DI Business Operations Summit

Tips, Tricks and Structured Resources on Achieving DMO Strategies

PRESENTED BY: Sharon Foltz, Managing Partner, Info-Tech Research Group

INFO~TECH RESEARCH GROUP | EXPONENTIAL IT

It Just Makes Sense to…

Leverage Best-Practices via Info-Tech Research Group and McLean & Co.

40,000 + members sharing best practices you can leverage

Millions spent developing tools and templates annually

Leverage direct access to over 200 analysts as an extension of your team

Use our massive database of benchmarks and vendor assessments

Get up to speed in a fraction of the time

Avoid starting from scratch

Overview

Insights

Frameworks to Leverage

Applying to Real Life

Takeaways

Common attributes of Small and Emerging Enterprises

Organizations in this space…

- Less revenue, small tech budget
- Family-owned, start-up, regional/community-based, etc.
- Local government, manufacturing, credit unions, associations, local health care, biotech, etc.

Leaders…

- May/may not be exec leadership
- Limited role in strategic planning
- Newer leaders and/or newer to this industry
- Struggles to balance operational vs. strategic focus

Teams…

- Fewer resources
- Range of IT experience
- Lots of different areas of focus and responsibility
- Limited succession plan
- Leverage service providers

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Diagnostic Summary

IT Management & Governance Diagnostic Program Benchmarks

Core Processes are color coded based on the classification with the highest percentage make-up for the peer group selected. A peer group with fewer than 3 organizations will not be displayed.

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Overall Benchmark

IT STRATEGY & GOVERNANCE

IT Strategy & Governance
Your Classification: --
Improve 25% | Leverage 31%
Evaluate 28% | Maintain 16%

Stakeholder Management
Your Classification: --
Improve 24% | Leverage 33%
Evaluate 24% | Maintain 19%

People & Resource Management
Your Classification: --
Improve 27% | Leverage 38%
Evaluate 22% | Maintain 14%

Project Management
Your Classification: --
Improve 25% | Leverage 30%
Evaluate 29% | Maintain 16%

IT OPERATIONS

Vendor Management
Your Classification: --
Improve 8% | Leverage 15%
Evaluate 37% | Maintain 40%

Service Desk
Your Classification: --
Improve 13% | Leverage 50%
Evaluate 17% | Maintain 20%

Requirements Gathering
Your Classification: --
Improve 24% | Leverage 30%
Evaluate 31% | Maintain 16%

INFRASTRUCTURE MANAGEMENT

Incident & Problem Management
Your Classification: --
Improve 17% | Leverage 39%
Evaluate 21% | Maintain 23%

Asset Management
Your Classification: --
Improve 10% | Leverage 13%
Evaluate 42% | Maintain 35%

Availability & Capacity Management
Your Classification: --
Improve 13% | Leverage 27%
Evaluate 34% | Maintain 27%

Change & Release Management
Your Classification: --
Improve 15% | Leverage 26%
Evaluate 34% | Maintain 26%

SECURITY & RISK MANAGEMENT

Security Strategy
Your Classification: --
Improve 23% | Leverage 60%
Evaluate 12% | Maintain 5%

Disaster Recovery Planning
Your Classification: --
Improve 24% | Leverage 42%
Evaluate 22% | Maintain 12%

Business Continuity Planning
Your Classification: --
Improve 23% | Leverage 39%
Evaluate 25% | Maintain 13%

APPLICATION MANAGEMENT

Application Selection & Implementation
Your Classification: --
Improve 15% | Leverage 21%
Evaluate 37% | Maintain 27%

Data Architecture & Governance
Your Classification: --
Improve 24% | Leverage 29%
Evaluate 30% | Maintain 17%

Analytics & Reporting
Your Classification: --
Improve 23% | Leverage 21%
Evaluate 37% | Maintain 18%

Application Portfolio Management
Your Classification: --
Improve 12% | Leverage 17%
Evaluate 47% | Maintain 24%

IMPROVE	EVALUATE	MAINTAIN	LEVERAGE
High Importance and Low Effectiveness	Low Importance and Low Effectiveness	Low Importance and High Effectiveness	High Importance and High Effectiveness

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Diagnostic Summary Insights

High Importance

- IT Strategy and Governance
- Stakeholder Management
- People & Resource Management
- Project Management
- Service Desk
- Incident & Problem Management
- Security Strategy
- Disaster Recovery Planning
- Business Continuity Planning

Low Importance

- Vendor Management
- Requirements Gathering
- Asset Management
- Availability & Capacity Management
- Change & Release Management
- Application Selection & Implementation
- Data Architecture & Governance
- Analytics & Reporting
- Application Portfolio Management

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5 common challenges departments face in Small and Emerging Enterprises

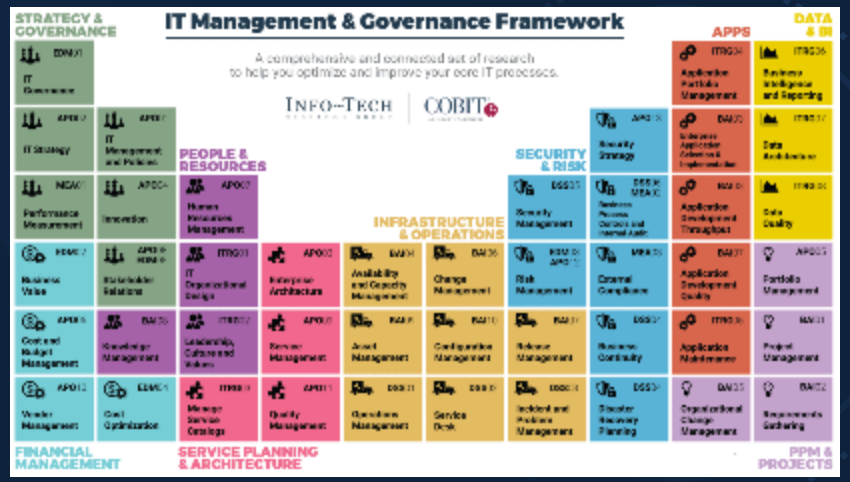
1. Resources have multiple responsibilities
2. Breadth versus depth dilemma
3. Talent battle
4. Big target for cyber-attacks
5. IT leaders do not have a seat at the table

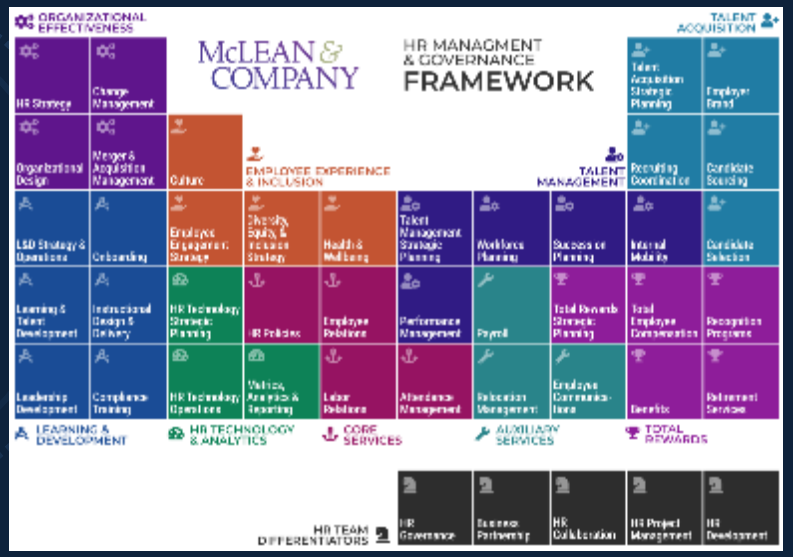
Tailored solutions for your unique space

- ✓ Applicable to current maturity and resources
- ✓ Right-sized targets and approaches
- ✓ Actionable best practices
- ✓ Tools, templates, processes, and procedures act as accelerators
- ✓ Value-focused partnerships

Right-sized approaches meet organizations where they are and provide **actionable** and **critical** resources.

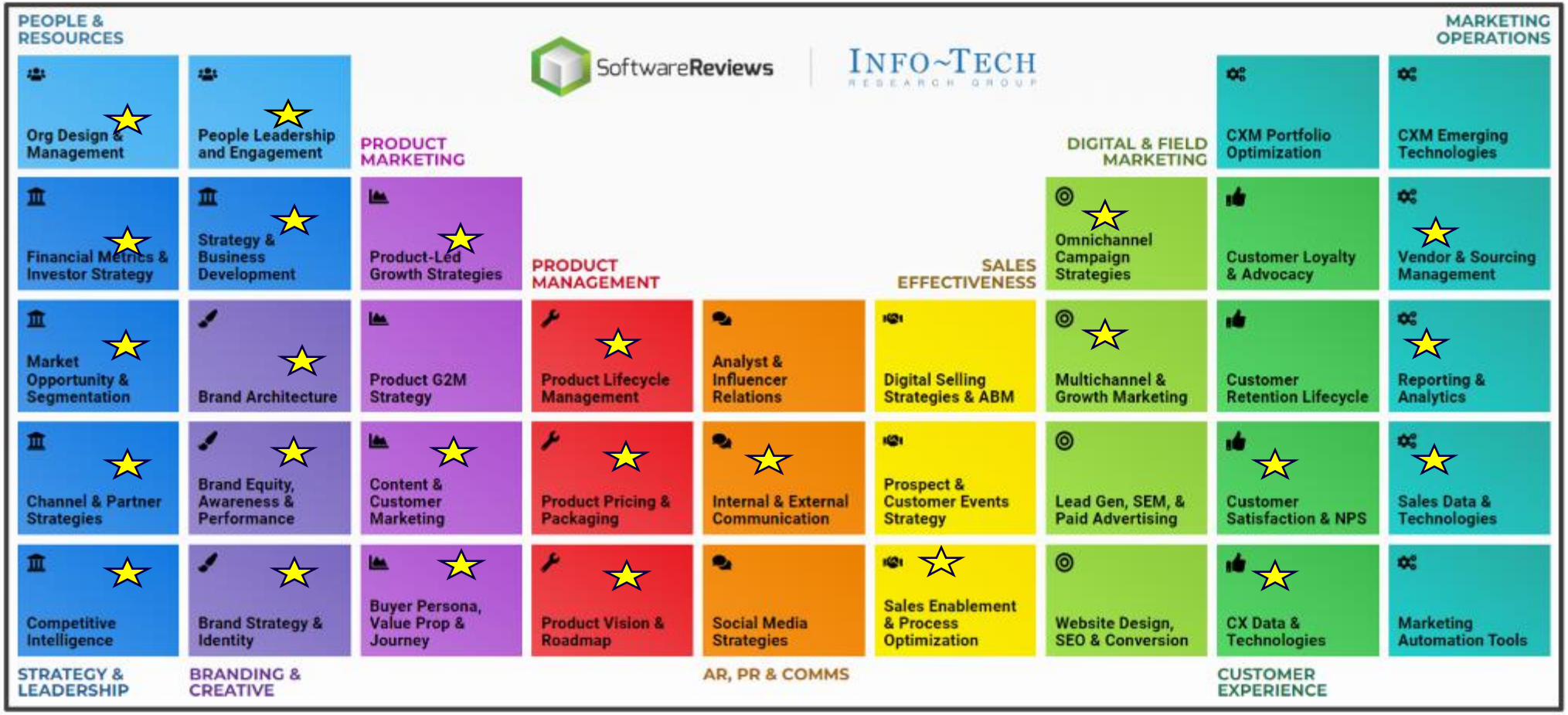
Leverage best practice frameworks to support DMAP Accreditation

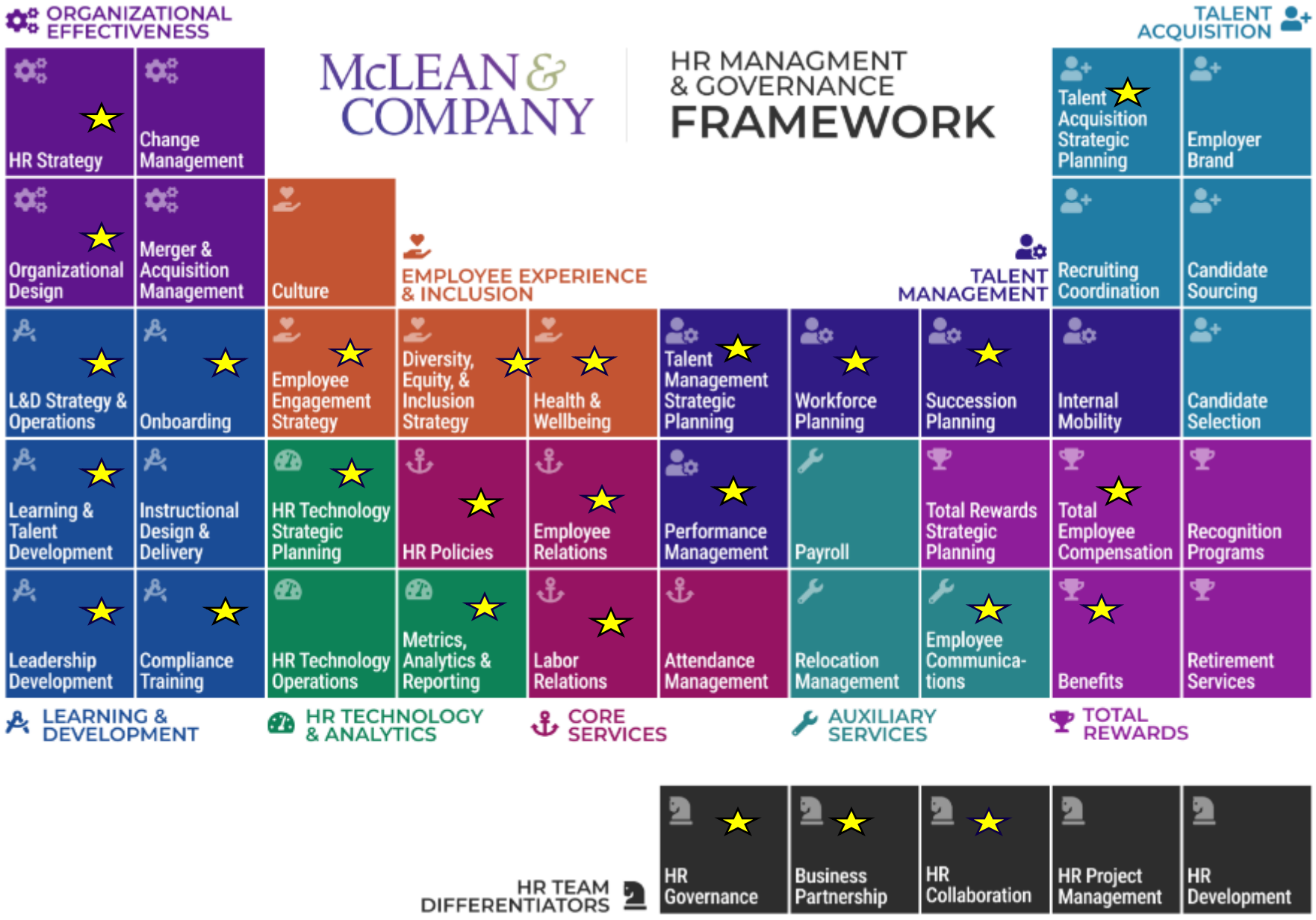


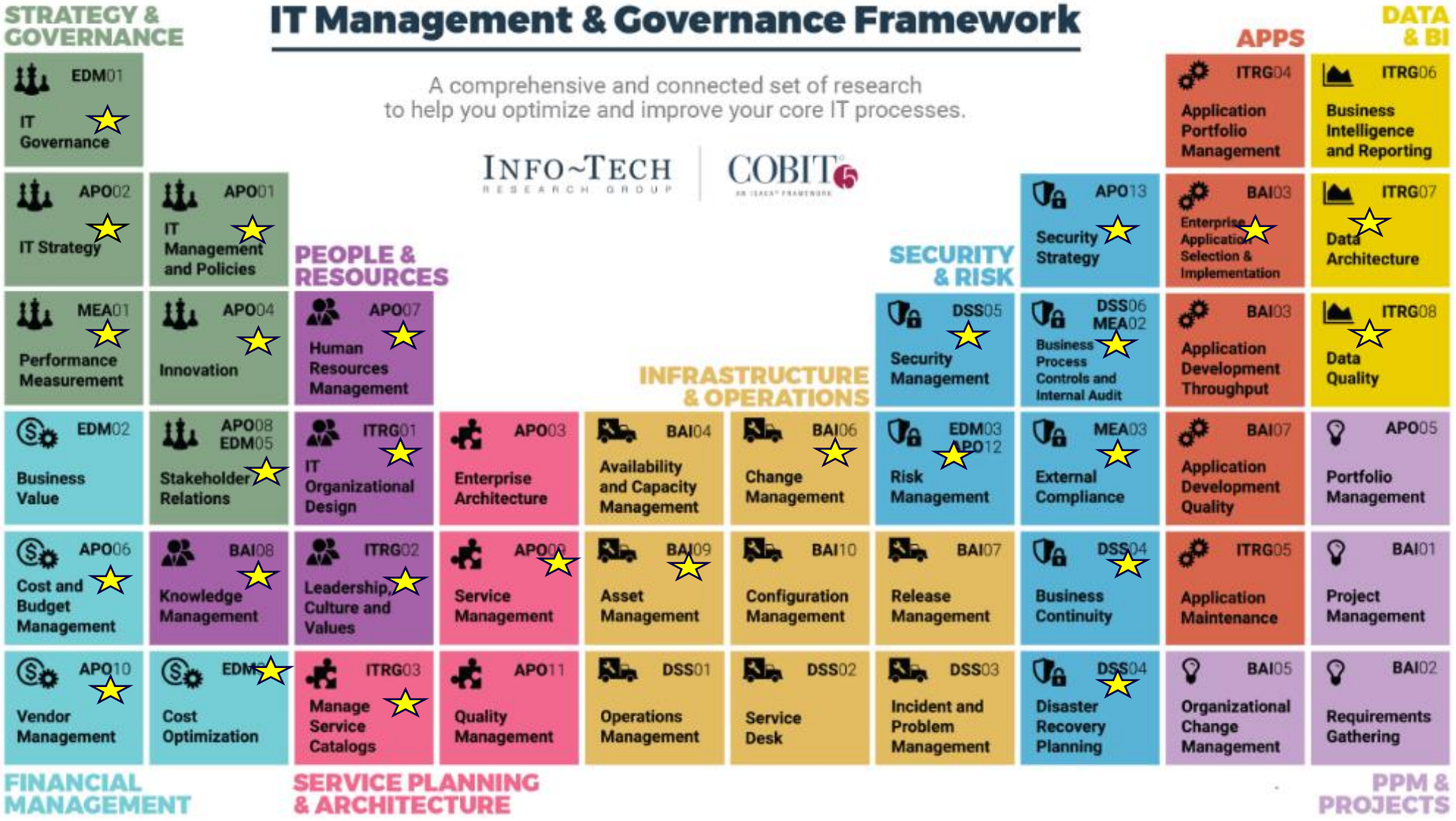


Technology Marketing Management Framework

A complete set of integrated how-to research and tools to advance your marketing, product and business performance.




ORGANIZATIONAL EFFECTIVENESS
HR Strategy
Change Management
Organizational Design
Merger & Acquisition Management
L&D Strategy & Operations
Onboarding
Learning & Talent Development
Instructional Design & Delivery
Leadership Development
Compliance Training
McLEAN & COMPANY
HR MANAGMENT & GOVERNANCE FRAMEWORK
Culture
EMPLOYEE EXPERIENCE & INCLUSION
Employee Engagement Strategy
Diversity, Equity, & Inclusion Strategy
Health & Wellbeing
HR Technology Strategic Planning
HR Policies
Employee Relations
HR Technology Operations
Metrics, Analytics & Reporting
Labor Relations
TALENT ACQUISITION
Talent Acquisition Strategic Planning
Employer Brand
TALENT MANAGEMENT
Recruiting Coordination
Candidate Sourcing
Talent Management Strategic Planning
Workforce Planning
Succession Planning
Internal Mobility
Candidate Selection
Performance Management
Payroll
Total Rewards Strategic Planning
Total Employee Compensation
Recognition Programs
Attendance Management
Relocation Management
Employee Communica-tions
Benefits
Retirement Services
LEARNING & DEVELOPMENT
HR TECHNOLOGY & ANALYTICS
CORE SERVICES
AUXILIARY SERVICES
TOTAL REWARDS
HR TEAM DIFFERENTIATORS
HR Governance
Business Partnership
HR Collaboration
HR Project Management
HR Development


IT Management & Governance Framework
A comprehensive and connected set of research
to help you optimize and improve your core IT processes.
INFO-TECH RESEARCH GROUP
COBIT 5
STRATEGY & GOVERNANCE
EDM01 IT Governance
APO02 IT Strategy
APO01 IT Management and Policies
MEA01 Performance Measurement
APO04 Innovation
EDM02 Business Value
APO08 EDM05 Stakeholder Relations
APO06 Cost and Budget Management
BAI08 Knowledge Management
APO10 Vendor Management
EDM Cost Optimization
FINANCIAL MANAGEMENT
PEOPLE & RESOURCES
APO07 Human Resources Management
ITRG01 IT Organizational Design
ITRG02 Leadership, Culture and Values
ITRG03 Manage Service Catalogs
SERVICE PLANNING & ARCHITECTURE
APO03 Enterprise Architecture
APO09 Service Management
APO11 Quality Management
INFRASTRUCTURE & OPERATIONS
BAI04 Availability and Capacity Management
BAI06 Change Management
BAI09 Asset Management
BAI10 Configuration Management
DSS01 Operations Management
DSS02 Service Desk
SECURITY & RISK
DSS05 Security Management
EDM03 APO12 Risk Management
BAI07 Release Management
DSS03 Incident and Problem Management
APO13 Security Strategy
DSS06 MEA02 Business Process Controls and Internal Audit
MEA03 External Compliance
DSS04 Business Continuity
DSS04 Disaster Recovery Planning
APPS
ITRG04 Application Portfolio Management
BAI03 Enterprise Application Selection & Implementation
BAI03 Application Development Throughput
BAI07 Application Development Quality
ITRG05 Application Maintenance
BAI05 Organizational Change Management
DATA & BI
ITRG06 Business Intelligence and Reporting
ITRG07 Data Architecture
ITRG08 Data Quality
APO05 Portfolio Management
BAI01 Project Management
BAI02 Requirements Gathering
PPM & PROJECTS

Comprehensive & Connected Approach

Example Journey: Data Strategy

Baseline Current State

Collect and benchmark

- Understand view of data
- Stakeholder feedback and maturity diagnostics
- Presentation-ready reports

Ongoing service improvement

Ensure IT continuously delivers value

- Adopt a service management ongoing maturation approach, in parallel and ongoing
- Embed ongoing communication, governance, and adoption

STEP 01

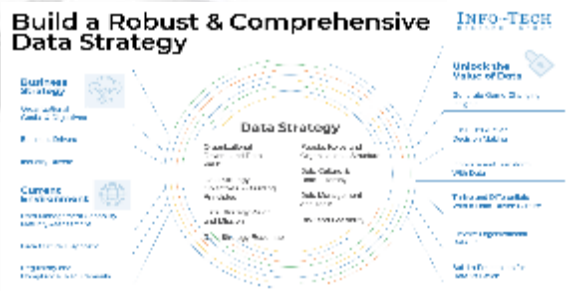
Align to Value

Increase business and customer satisfaction by delivering services focused on creating business value.

- Develop understanding of business
- Leverage reference architectures as starting point for value streams and business capabilities

STEP 02

STEP 03



Develop Data Strategy

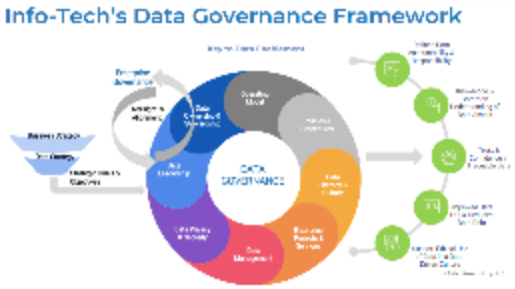
Focus on key value drivers for business

- Validate and optimize operations, touchpoints, and processes
- SOPs, process flows, and other best practice tools and templates

STEP 04

Apply Right-Sized Governance and Management

- Ensure your data governance program delivers measurable business value by aligning the associated initiatives with the business architecture



STEP 05

Comprehensive and Connected IT Project Methodologies and Practical Tools

INFO~TECH RESEARCH GROUP

- Ongoing partnership
- Robust research coverage of high-impact areas
- Interconnected frameworks underpin research
- Practical and tactical research
- Actionable tools and advice
- Highly visual written and video content
- Designed to be easily consumed, customized, and shared
- Hundreds of road-tested tools and templates
- Right-sized approaches

Phoenix Suns' IT group fosters community and innovation to optimize the fan experience

Results

- Established community to drive innovation in sports entertainment
- Accelerated IT and business decision-making to improve fan experience and boost revenue
- Evolved CIO role leveraging sound data and trusted research

"From a personal growth standpoint, Info-Tech has given me so much more confidence. Being able to walk into a meeting with an answer that has been well-researched is incredibly empowering."

Steve Reese
CIO
Phoenix Suns

View the video testimonial

MEMBER NAME
Steve Reese, CIO, Phoenix Suns

INDUSTRY
Pro Sports

INFO-TECH SOLUTIONS
- Sports Industry team membership
- Sports Industry CIO Roundtables
- SoftwareReviews

Comprehensive & Connected Approach

Example Journey: Security Focus

IT Security Diagnostic

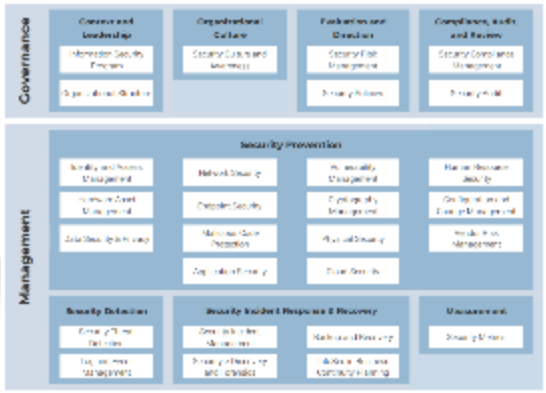
Collect the data you need to effectively manage IT security

- Four security feedback and maturity assessments
- Boardroom-ready reports with your data

STEP 01

Build an Information Security Strategy

- Ensuring alignment with business objectives.
- Assessing organizational risk and stakeholder expectations.
- Enabling a comprehensive current state assessment.
- Prioritizing initiatives and building out a security roadmap.



STEP 02

STEP 03

Build a Risk-Based Security Budget

- Build a budget that is designed to be as dynamic as the business growth model.
- Collect your organization's requirements and build options to describe how increases and decreases can affect the risk level.
- Discuss the different budgets with the business to determine what level of funding is needed for the desired level of security.

STEP 04

Develop and Deploy Security Policies

Save time and money using the templates provided to create your own customized security policies mapped to the Info-Tech framework, which incorporates multiple industry best-practice frameworks (NIST, ISO, SOC2SEC, CIS, PCI, HIPAA).

STEP 05

Build a Security Awareness and Training Program

Prepare your end users to effectively defend the organization against security threats

- Ready-to-teach training modules
- Tools and templates

Comprehensive and Connected IT Project Methodologies and Practical Tools

INFO-TECH RESEARCH GROUP

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- Practical and tactical research
- Actionable tools and advice
- Highly visual written and video content
- Designed to be easily consumed, customized, and shared
- Hundreds of road-tested tools and templates
- Right-sized approaches

Soboba bets on steady IT leadership as business grows

Results

- Developed IT organization to navigate business expansion and pandemic uncertainty
- Matured IT structure, policies, and processes
- Analyzed stakeholder perspectives to inform IT strategy
- Advanced security maturity with new resources and guidance

"Our partnership with Info-Tech has helped dramatically – Info-Tech research, templates, and guidance saves me hours and hours of time and helps me to make decisions more effectively."

Steven Nino
CIO, Soboba Band of Luiseño Indians

MEMBER NAME
Steven Nino, CIO, Soboba Band of Luiseño Indians

INDUSTRY
Gaming

INFO-TECH SOLUTIONS
- CIO Business Vision
- CEO-CIO Alignment
- 'Redesign your IT Organizational Structure' Workshop
- Security Policy Review Guided Implementation
- IT Management and Governance Diagnostic
- Technical Counselor

McLEAN & COMPANY

CUSTOMER STORY: **DR. BRIAN DICKENS, CHRO**

University of Tennessee re-imagines HR with support from McLean & Company

Results

- Accessed McLean & Company research and advisory services to deliver on HR strategy
- Leveraged expert resources to quickly respond to pandemic requirements
- Conducted employee surveys to identify opportunities for HR change
- Benefited from expert, third-party status to advance DEI initiative

"The power and immediacy of the Engagement survey results gave us the ability to develop a strategy to help shift the paradigm and become the learning organization that we need to be. It's truly the reason that McLean & Company is a partner with UT System today."

Dr. Brian Dickens
Chief Human Resources Officer
University of Tennessee

MEMBER
Dr. Brian Dickens, CHRO, University of Tennessee System

INDUSTRY
Higher Education

MCLEAN & COMPANY SOLUTIONS

- HR Diagnostics
- DEI Strategy Workshop
- 'Develop an Engagement Program Strategy' Guided Implementation
- Executive Counselor Membership

EXPONENTIAL IT

LEAN INTO THE CURVE

Info-Tech's strategic and actionable principles to enable IT leaders to extract the value from accelerating technology advancements

1980 — 2000 — 2020

PARADIGM SHIFTS IN THE ORGANIZATION

COMPUTERIZATION
Organizations adopt PCs and networks at scale

DIGITALIZATION
The internet allows ubiquitous connectivity

AUTONOMIZATION
AI renders organizational capabilities autonomous

PARADIGM SHIFTS IN THE ROLE OF IT

TRUSTED OPERATOR
IT helps the organization automate the back office and create efficiencies

ORGANIZATIONAL PARTNER
IT enables the transformation of business and service models and the creation of value through digital channels

ORGANIZATIONAL LEADER
IT accelerates value creation by embracing exponential technologies

EXPONENTIAL IT TRAJECTORY

ALGORITHMS
INTERNET
VIRTUALIZATION
CLOUD
BIG DATA
NLP & IMAGE RECOGNITION
GENERATIVE AI

EXPONENTIAL TECHNOLOGY ADVANCEMENTS

LINEAR IT TRAJECTORY

1980 — 2000 — 2020

INFO-TECH LIVE 2023

Lean Into the Curve by Applying Exponential IT Principles

EXPONENTIAL IT

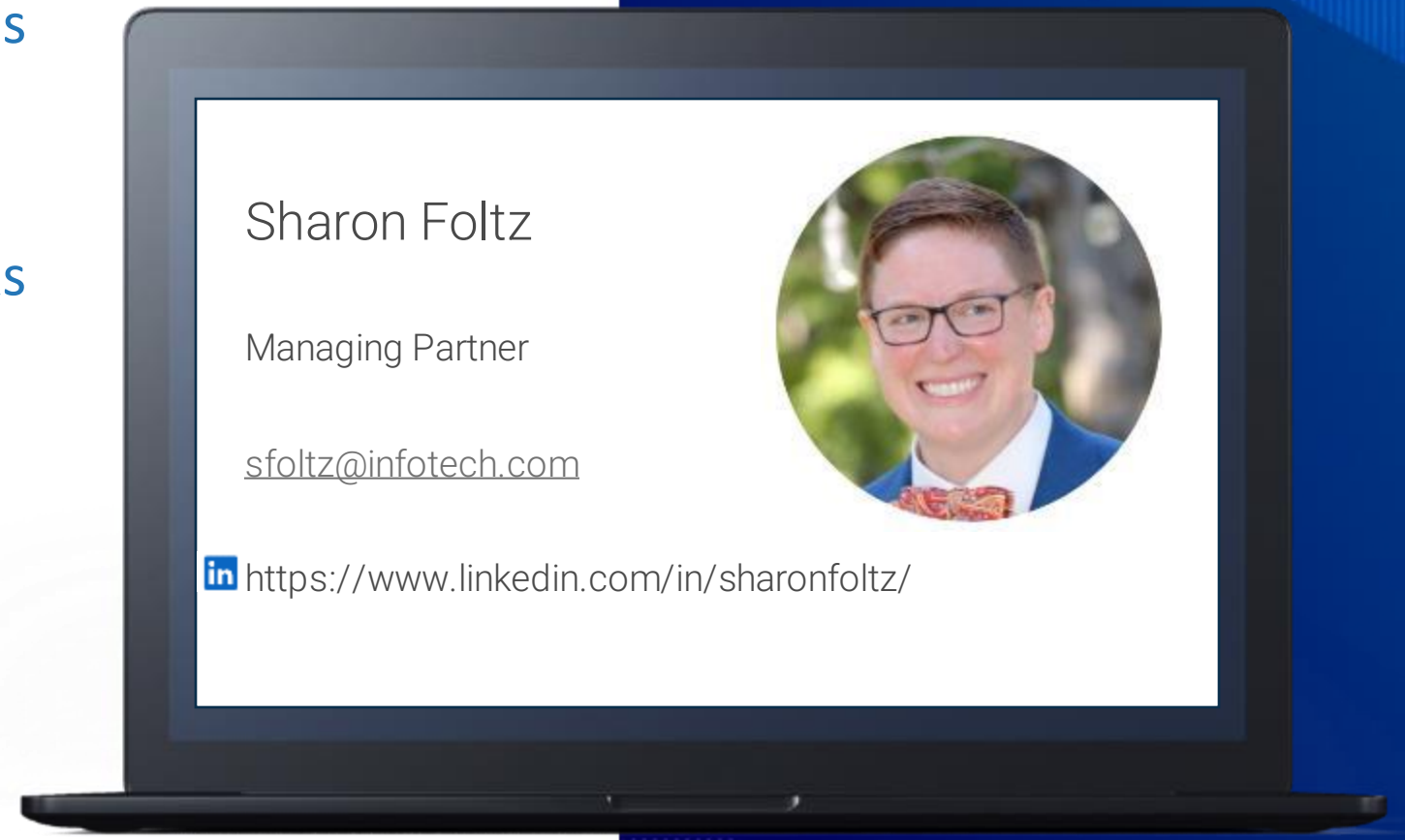
- **STRATEGY, RISK & GOVERNANCE** — Capitalize on the Commoditization of IT
- **FINANCIAL & VENDOR MANAGEMENT** — Shift From Technology to Capabilities
- **SERVICE PLANNING & ARCHITECTURE** — Deliver Organizational Capabilities
- **PEOPLE & LEADERSHIP** — Lead Transformation to a Technology-First Enterprise
- **SECURITY & PRIVACY** — Shift From Reactive to Predictive
- **APPLICATIONS** — Move From Applications to Organizational Capabilities
- **DATA & ANALYTICS** — Make Data Capabilities a Differentiator
- **INFRASTRUCTURE & OPERATIONS** — Focus on Value Over Assets
- **PROJECT & PORTFOLIO MANAGEMENT** — Automate & Focus on High-Value Activities

INFO-TECH LIVE 2023

EXPONENTIAL IT
LEAN INTO THE CURVE
Info-Tech's strategic and actionable principles to enable IT leaders to extract the value from accelerating technology advancements
EXPONENTIAL IT
INFO-TECH LIVE 2023
STRATEGY, RISK & GOVERNANCE
CAPITALIZE ON THE COMMODITIZATION OF IT
FINANCIAL & VENDOR MANAGEMENT
SHIFT FROM TECHNOLOGY TO CAPABILITIES
SERVICE PLANNING & ARCHITECTURE
DELIVER ORGANIZATIONAL CAPABILITIES
PEOPLE & LEADERSHIP
LEAD TRANSFORMATION TO A TECHNOLOGY-FIRST ENTERPRISE
SECURITY & PRIVACY
SHIFT FROM REACTIVE TO PREDICTIVE
APPLICATIONS
MOVE FROM APPLICATIONS TO ORGANIZATIONAL CAPABILITIES
DATA & ANALYTICS
MAKE DATA CAPABILITIES A DIFFERENTIATOR
INFRASTRUCTURE & OPERATIONS
FOCUS ON VALUE OVER ASSETS
PROJECT & PORTFOLIO MANAGEMENT
AUTOMATE & FOCUS ON HIGH-VALUE ACTIVITIES
STOP BEING PULLED, START PUSHING
Co-own organizational outcomes
OWN YOUR SEAT AT THE TABLE
Lead new technology governance
DO MORE VALUABLE WORK
Transform Infrastructure and Applications into utilities
STOP EXPERIMENTING, START DELIVERING
Fund exponential value creation
ADD CATS TO THE HERD
Boost vendor management practices
DEMONSTRATE YOUR VALUE
Build outcome measurement
FASTEN YOUR SEATBELTS
Shift from service to outcome delivery
STOP SILOED APPLICATIONS
Create integrated enterprise services
GET INTO THE WEEDS
Architect business capabilities
STOP EMPIRE-BUILDING
Embrace federated and hybrid operating models
SHATTER THE ORG CHART
Reinvent the resource strategy
TRAIN, INVEST, AND NURTURE
Let the workforce be with you
ASSUME THEY ARE MORE SOPHISTICATED THAN YOU
Defend against AI-enabled attacks
GO BACK TO THE DRAWING BOARD
Mitigate rampant privacy risks
OVERCOME YOUR HESITATION
Enable autonomous decision making
DELIVER CONTINUOUSLY (FINALLY)
Use AI and ML to drive automation
BAN ONE-OFFS
Double down on platforms
DON'T BE JUST A PARTNER
Create true co-owners
GO BEYOND ANALYTICS
Treat data as a product
USE DATA AS THE LIFEBLOOD
Augment your data for more value
DEFAULT TO AI
Team up DataOps with MLOps
GIVE UP CONTROL
Let AI take over core operations
BECOME A BANKER
Implement FinOps
LEAN INTO AUTONOMOUS PROVISIONING
Abstract away the underlying infrastructure
SOLVE PROBLEMS, NOT CALENDARS
Automate traditional PMO capabilities
PLAN IN REAL TIME
Let AI run ongoing resource allocation
TRUST, BUT VERIFY
Enable true accountability
INFO-TECH LIVE 2023

Key takeaways

1. You are not alone in the challenges you are facing

2. Leverage best practice frameworks and right-sized tools/templates to accelerate your strategies

3. Consider Exponential IT to enable leaders to extract the value from accelerating technology advancements