

Statewide Strategic IT Plan Process Roadmap To Success



1. Establish Committee(s)

OCIO establishes a Strategic Planning committee(s) for oversight and project work comprised of stakeholders representing a broad spectrum of Information Technology constituents, agency Directors, CIO's, OCIO staff and private industry. This step is crucial so that there is an over-arching voice and accountability to the process. Consider an agreed-upon time to change membership after one full cycle to bring freshness to the never-ending process of strategic planning.



Why:

To have the best stakeholder representation and work units that will help move the Strategic Plan from creation to implementation.

2. Project Planning Activities

- Develop Project Plan
- Establish a Timeline (as outlined in step 3)
- Develop Project Communication Plan
- Establish shared website to foster transparency throughout the project
- Determine environmental factors- budget, timeline, resources and legislation



Considerations:

- Do we have the appropriate resources (people/time/budget) available in house to run this project?
- If no, and budget is available, consider hiring an outside consultant to steer the logistics of the strategic planning process, as well as provide data analytics.
- The solution may be a combination of existing information technology staff and outside consultant (if applicable).

Why:

To establish project parameters and to evaluate options to ensure project success – Right sizing.

3. Establish Timeline

The timeline should scope the entire strategic planning process including stages for planning/decisions, information gathering, plan creation, action implementation, communication and process control.

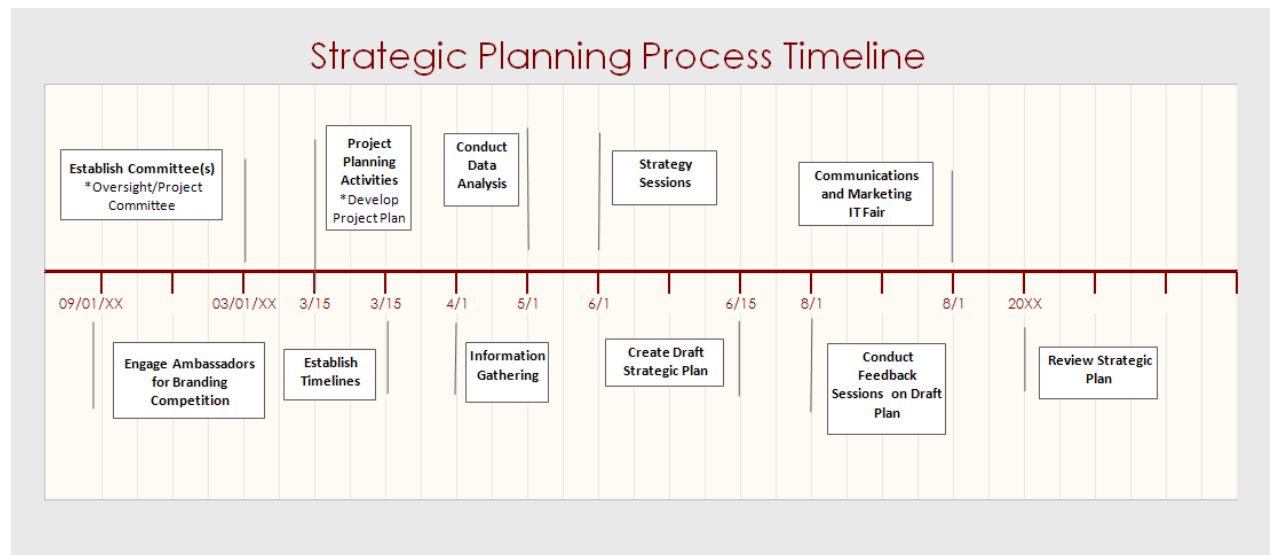
Our recommendation is to keep the full strategic plan to a short overall timeframe – two to five years. Being that information technology changes continually, we suggest a shorter overall timeline for the Plan, so that the focus can be kept on the reality of that ever-changing horizon.

Two separate timelines should be considered.

- A high level process timeline for public consumption (Strategic Planning Process Timeline)
- A detailed project timeline for the project team use (Strategic Planning Project Timeline)
- Establish the timelines and stick to it.

Strategic Planning Process Timeline

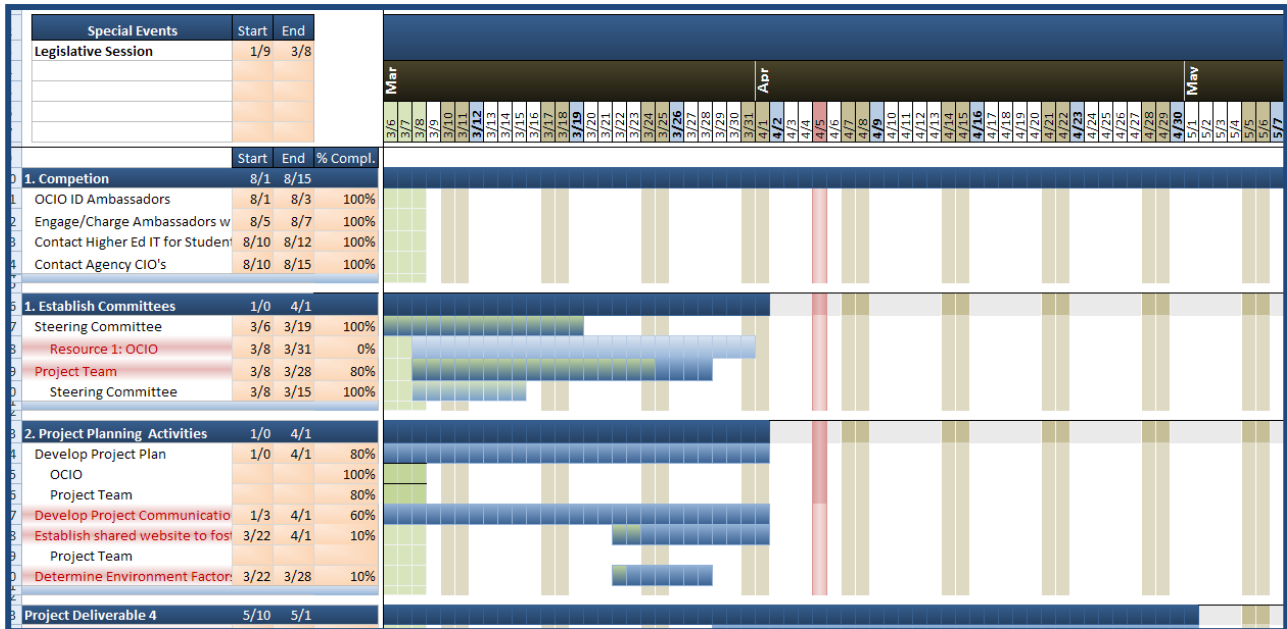
A timeline of the overall process that will be available for general communication purposes and available via the recommended Project Communication Plan.



3. Establish Timeline (continued)

Strategic Planning Project Timeline

Contains detailed tasks and resources to track deadlines.



Why:

For the public, it's for communication and to be transparent in our process. For the project team the timeline provides organization of task, resources, and milestones.

4. Strategic Planning Committee

Duties of the Planning committee are:

- Brand the plan – Give it a name, tag line or phrase so that to be used throughout the process so that all participants connect that phrase to the statewide OCIO Strategic Planning process.

Suggestion: Engage agency and university IT departments to compete for the next years IT Strategic Plan brand (theme) and logo. The winning brand and logo would be published on the next years Strategic Plan and the driver in the Marketing strategy.

This engages the young minds that tend to have the newest technology and freshest ideas and aren't restricted by state policy. It initiates state IT departments to introduce the process of strategic planning at a greater depth within the department other than the CIO.

- Formulate questions and facilitate the information gathering processes
 - Establish a repeatable *Discussion Guide* to ensure a customer's experience a similar experience while promoting a broader range of discussion.
- Provide direction for development of the mission, goals and objectives
- Assist with implementation and communication of the plan
- Ensure consistent messaging

Guiding Principles:

- The plan should be developed in accordance with OCIO standards and policies
- The committee work should be transparent –using a tool such as a website/SharePoint site so that strategic planning activity is available



Why:

This entity should be in charge of the process and be transparent during **all** the stages through implementation of the strategic plan

5. Perform Information Gathering

This should be accomplished by assigned member(s) of the committee and/or consultant (if applicable).

- Determine your audience- Including state agency CIO's, agency directors/assistant directors, CIO's of higher education and general state IT staff.
- Review new and outstanding legislation and/or any prior strategic plan, if available.
- Gather the voice of the customer
- Facilitate open and audience-specific focus group sessions, individual interviews, think tank sessions (e.g. IPMA), web surveys, etc.



Gather current industry standards –

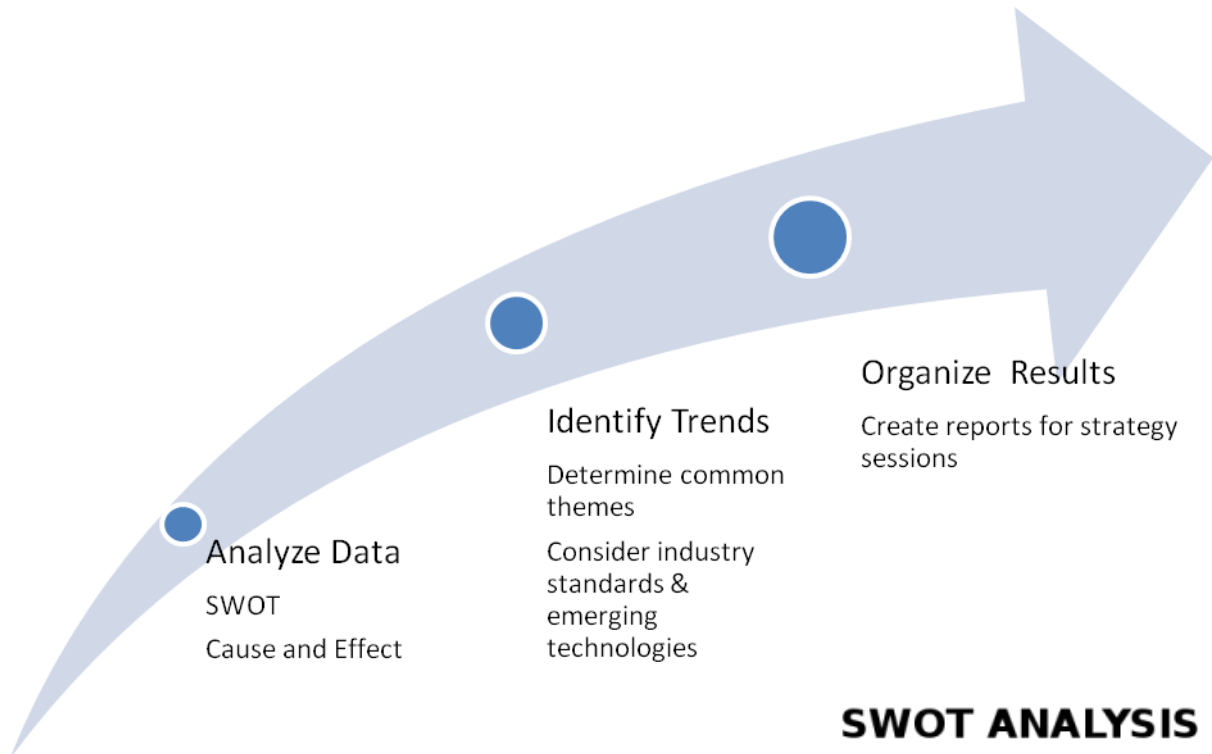
- Gartner and InfoTech
- Review last prior strategic/action plan and/or commitments in order to:
 - Prevent mistakes from the past
 - Determine anything outstanding
 - Change communication strategy if needed

Why:

To obtain current understanding and provide data that creates a direction of the SW Strategic Mission, goals and objectives.

6. Conduct Data Analysis

Determine who will conduct the data analysis. Options are strategic plan committee, consultants (if applicable), or stakeholders assigned this responsibility.



SWOT ANALYSIS

	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin (attributes of the organization)	S Strengths	W Weaknesses
External origin (attributes of the environment)	O Opportunities	T Threats

Why:

To create a comprehensive report of data from the information gathering sessions. This output will be used in the strategy sessions.

7. Conduct Strategy Sessions

Purpose of strategy sessions is to craft the information technology statewide mission, goals and objectives based on data obtained through the information gathering efforts.

- OCIO, committee members, stakeholders and consultants (if applicable) meet to review data results and to apply the results to mission, goals and objectives.
- Use the data to tell the unfolding story of statewide information technology's strategy.



Why:

To interpret the data output and establish the mission, goals and objective in order to forecast for future IT needs and trends.

8. Create the Draft Strategic Plan

OCIO, committee members, stakeholders and/or consultants (if applicable) draft Strategic Plan based on data analysis output and strategy session results.



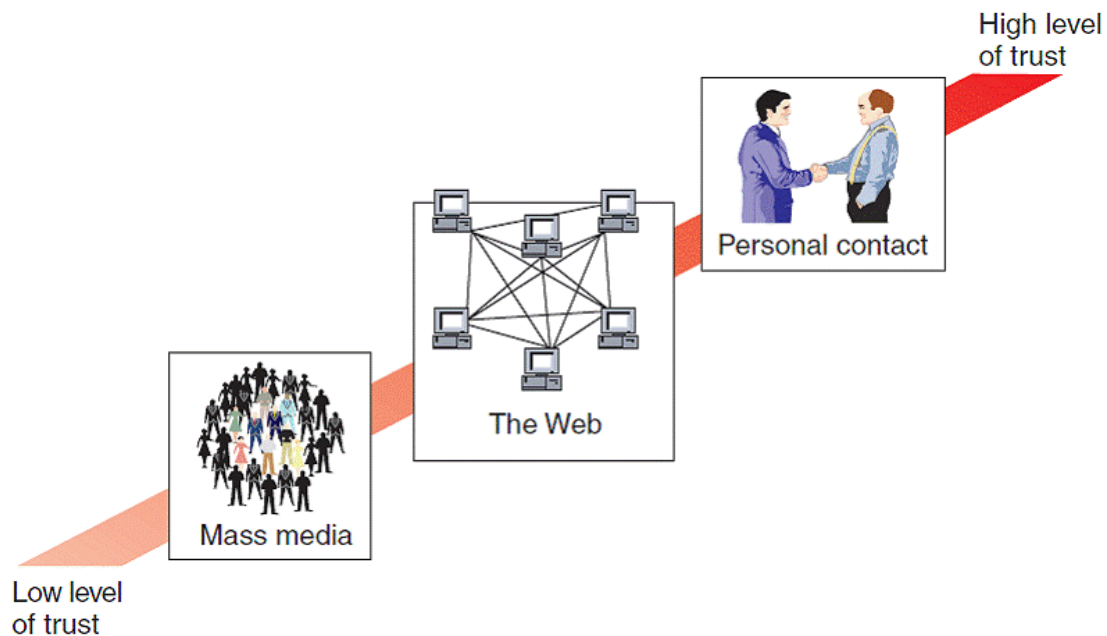
Why:

This draft becomes a reflection of the data collected and the results of the strategy sessions. This interim product should be communicated for feedback to ensure the voice of the customer is accurately represented.

9. Conduct Feedback Sessions

Seek feedback on draft Strategic Plan through:

- Open forum sessions
- Team meetings
- Leadership retreats- consider key stakeholders who will be reviewing the plan including the governor and members of the Technology Services Board
- Web survey
- Social media opportunities
 - Blogs, Facebook, Twitter etc
 - Project shared site (website and/or SharePoint)



Key Consideration:

When sharing draft plans be sure it is clear the document is not a final version.

Keep options open during the information gathering phase in order to identify other constituents/stakeholders who should be part of the review process.

Why:

Purpose of this step is to let constituents know that they have been heard and that their input has contributed to the draft plan. Provides another opportunity to review and approve feedback.

10. Review Strategic Plan

This is the formal review process to comply with the legislative directive. The Strategic Plan is presented to the Governor's Office and Technology Services Board to review and approve.



Why:

To inform entities and to promote buy-in for the statewide Information Technology mission, goals and objectives. As outlined in the legislation, the plan is to be first approved by the Technology Services Board and then presented to the Governor. Other entities can be included as identified in the information gathering phase.

11. Develop Action Plan

- OCIO, committee members and/or consultant (if applicable) and stakeholders develop and rollout the action plan workshops/training to include strategic objectives, key indicators of success with measureable metrics, and business process alignment.
- Monitor the execution of the strategic plan using a tool, which could be an action plan document, SharePoint list or a strategic plan software tool. The purpose is to measure the results or outputs against the plan.
- Determine champion(s) for each action item of the strategic plan who is responsible for the execution and monitoring of the plan. Champions have the authority and are accountable for ensuring that results are accomplished.



Action plan should foster:

- Commitment to the plan
- Implement the plan in a cooperative process
- Accountability for the successful completion of the plan

Why:

The action plan documents the actual tasks and measurements for the completion of the stated goals and objectives. This is where the actual work of the Strategic Plan is placed into movement allowing achievements to be measured, gaps to be identified, and future goals/gaps to be considered.

12. Marketing and Launch

This is a crucial step requiring focus and resources so that the entire Information Technology community can be involved. *Stay focused in this area, this is where the plan can fail if not communicated effectively!*

- Host a Strategic Plan Kickoff Fair



- Recruit strategic plan ambassadors, who are enthusiasts for the success, but need no formal authority
- Market the plan statewide with agencies, OCIO, IPMA. Marketing campaign consists of websites, java jackets, back of business cards, newsletters, screen savers, etc.



- Status updates about the strategic plan should be transparent and shared on a regular basis
- Status should contain the measurements
- Success of the strategic plan depends on multiple channels and repeated regularly
- Marketing should remain visible and alive for the duration of the strategic plan

Why:

Many great strategic plans were created well, but never communicated or marketed throughout the life time and became a stagnant and unusable document.