5 Steps to IT Planning and Strategy for Success

Strategic planning for businesses, large or small, is a critical process to achieve its goals and be profitable. Proper strategic planning includes both short-term and long-term planning and should touch upon every aspect of the business including: production and sales, organization structure, employee development, fiscal planning. What some organizations may not realize is that their Information Technology (IT) must also become a strategic goal and a key part of this planning process.

Organizations need to understand how they currently use technology and how it can be used strategically to improve business processes, making them more efficient and less costly, potentially increasing market position.

So what is IT planning really? Much like traditional business planning it is the process of determining how your organization can best use your technology to further your mission. It involves assessing your existing resources, defining your needs, and exploring solutions.

We'll break it down into 5 steps:

1. Define Success For Your Organization
   Use strategic goals to create aligning IT goals, make sure there is universal agreement throughout the organization

2. Assess Your Existing Resources
   Define the current state of your organization's technology by benchmarking where you are versus where you would like to be.

3. Define Your Needs
    Identify business needs and priorities.

4. Explore IT Solutions
   Based on your business needs, what should your IT solutions include?

5. Create a Technology Plan
   Use the knowledge gained from the previous steps to craft a strategic IT plan - What are the benefits, tasks and costs of implementation? Are there risks to address?

1. What does Success Mean to Your Organization?

The first and rather important step is determining *what success means to your organization*.

Certainly you have defined (or will be defining) strategic goals as you move into a new year, or even a new quarter. These goals could include anything from increased operational efficiencies, market share or financial resources to driving a more positive company culture. Whatever they may be, it is likely that reaching those goals is considered a success.

So, what does this have to do with IT?

The key here is to understand the business's needs and goals and make sure the technology and services are there to support these goals. For instance if your goal is to be more productive this year then you have to associate the real issues of the organization to the associated technology and support. There has almost certainly been a time you or a colleague has come into work and something is wrong with your technology – whether its email not working, you're getting unwanted popups, maybe documents have disappeared or you have the blue screen of death... You are now losing valuable time trying to contact the right person who you hope can then fix the problem. If your goal is to increase productivity, that idea is certainly going out the window on this particular morning. Add in issues a few times a month and you lose even more operational efficiency.

Technology issues will happen, there is no getting around that, but there is a way to be better prepared and proactive about it. Your technology functioning correctly and how you want it to is an integral part of your business. While you're taking time to create the strategic goals for your organization, use them to create aligning IT goals as well. Help your IT team create an IT 'vision statement' defining how and where technology can be put into place in order to help your organization fulfill its mission, enable or enhance your strategic plan, and improve organizational effectiveness. In this case your goal was to be more productive as an organization so you're related technology goal is to be more proactive and better at monitoring and maintaining company's systems.

Make sure all goals whether they are IT, HR, Finance, marketing, or any other are *all aligned to your strategic goals and mutually accepted throughout the entire organization*. This ensures that everyone is working within the same parameters, towards the same mutual idea of success and can utilize the correct processes to get there. A good IT team will put together a roadmap for IT success, but a great IT team will push you to make strategic business decisions and related goals that they can align to their specific IT plan.

2. Assess Your Existing Resources

Defining the current state of your organization's technology is the next step of the planning process. Start by benchmarking where you are versus where you would like to be.

An efficient way to determine the health of your technology is through an IT Assessment.   It not only plays an integral role in providing a snapshot of your company's computing system, but it also provides your organization perspective on the effectiveness of its system, staff, budget, vendors, procedures and company policies.

- Do you have a team, an individual, or no one monitoring it?
- Are things up to date?
- What is the current IT budget/investment?
- Is IT viewed as a 'cost' or as an 'enabler' of the business succeeding?

An IT assessment can help your organization improve technology ROI and align IT investments with your overall business strategy.

A comprehensive IT assessment and analysis will help you better understand your current state of technology and prepare your organization for future needs and growth. This includes all hardware and software currently in use throughout your organization. Once you understand your current state, it is much easier to define needs and goals (the next step of the process) and develop a technology plan that aligns with these and your budget.

- Assess your organization's current internal policies and procedures in the areas of technology training, security and disaster recovery.
- Identify which of your staff members may need training, and discover who can act as resources within your organization.
- Identify immediate (critical) needs which are classified as situations that severely hamper or prevent the execution of activities key to your organization.
- Review hardware, software and data strategies for servers, mission-critical workstations, backups, anti-virus, etc.

All this may sound daunting but you may not even realize there is a critical need until going through the process. It is incredibly important to know where your IT stands in order to plan and improve for the future.

3. Define Your Needs

Identifying your business needs and priorities is the third step in the planning process. Since you should already have strategic goals set and hopefully have done a business and IT analysis, your needs should be fairly laid out.

Based on your goals, desired results or outcomes, and foreseeable issues or problems along the way you can determine what your business needs may be. This will be a large factor in what your IT solutions should consist of.

Your needs may include:
- Adapting to new business changes or acquisitions
- Ability to accommodate expected business growth
- Solutions to enhance corporate productivity
- Needs for any policy changes
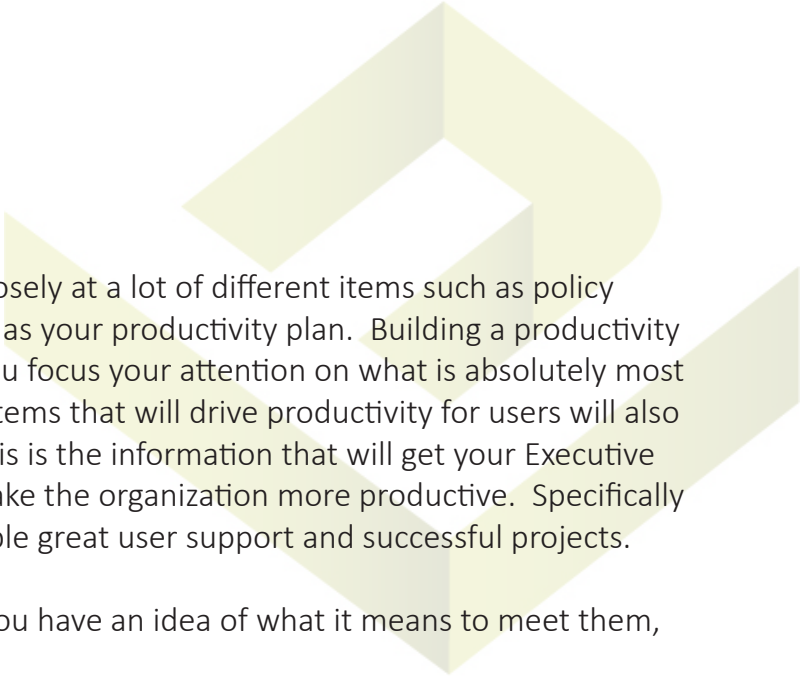- Regulatory or compliance needs or changes

Once you know your business needs, you can begin to explore how to meet them. Let's look at expected business changes, acquisitions and growth goals for the year. These needs indicate that you will need your staff and systems to be fully functioning and agile for these changes. The key here is productivity. So what does it take to keep your staff up and running in order to do their jobs effectively? Let's face it, most of us spend almost all of our time doing our jobs on a computer, tablet, or phone so the less downtime and issues there are when it comes to our technology, the more efficient we can be.

Productivity in IT closely aligns with the ability to reduce incidents by doing all the simple proactive tasks that need to be completed regularly. These simple things include monitoring all your systems and network components, regular maintenance of these devices, and on-going management of your IT environment. These tasks can decrease unforeseen incidents, keeping systems running and productivity high.

The problem that most IT support teams experience is that their daily priorities are:
1. Reactionary support of users
2. The large corporate projects that are being pushed by the Executive team

Generally the Executive team does not understand what the proactive tasks are and/or why they are important. In turn, they don't put a priority on these tasks which in the end reduce downtime. Once you have reduced your downtime it's easier to react quickly to your users and have the time to work on the key corporate projects.

While defining your needs you will need to look closely at a lot of different items such as policy changes, regulatory and compliance needs as well as your productivity plan. Building a productivity plan into your overall planning process will help you focus your attention on what is absolutely most important when it comes to IT. Conveniently the items that will drive productivity for users will also help you with your regulatory and compliance. This is the information that will get your Executive team on board with the items that are going to make the organization more productive. Specifically making the proactive tasks a high priority will enable great user support and successful projects.

So, now that you know what your needs are and you have an idea of what it means to meet them, you are ready for step 4, exploring solutions.

4. Explore Solutions

Now that you have determined your business needs and what it means to meet them, it is time to explore IT solutions. What can the organization do in order to meet those defined needs and reach your set goals?

A few solutions may include:
- Purchasing new software or software updates
- Replacing obsolete hardware
- Providing general or focused training for the staff
- Replacing or customizing a database
- Assessing Managed Services as an IT solution
- Utilizing outside expertise
- Developing policies and procedures for using computers
- Implementing backup systems and security measures

Let's look back at some of our needs – expected growth, new compliance regulations, and tools to complete overall goals for the year (which can include increased operational efficiencies, financial resources or an improved company culture.) Now take a look at the current resources such as equipment, IT staff, internal policies and processes. You may have some of the resources you need in place but it is likely, especially if this is your first true look at IT, you will need additional resources or refined solutions.

The key here is to focus as much on the Support (or People) and Processes as on the Technology itself. Remember your IT support team is only as good as the individual people and the tools that you provide them. To have great IT support you need to hire great people, enable your IT team with great tools and processes or look into support as a Service. Having processes in place to make sure all the regularly needed maintenance and monitoring is being done, as a Service Provider would do, is so critical in today's environment. Your technology is only as good as the care, support and end user training you provide on it.

The next piece is what everyone wants to be doing... projects! Implementing all your solutions which will help the organization meet long term goals are very important (this is where executives often put the most emphasis). Sometimes internal staff can get tied up in the projects and day to day fixes that they let the proactive management duties go. Once these solutions are installed correctly then they must be monitored and managed to proactively keep them up and running which may be the most important but more difficult part. With all the tasks thrown at IT these days weighing the use of a managed IT support provider to help you stay ahead of the curve isn't a bad idea.
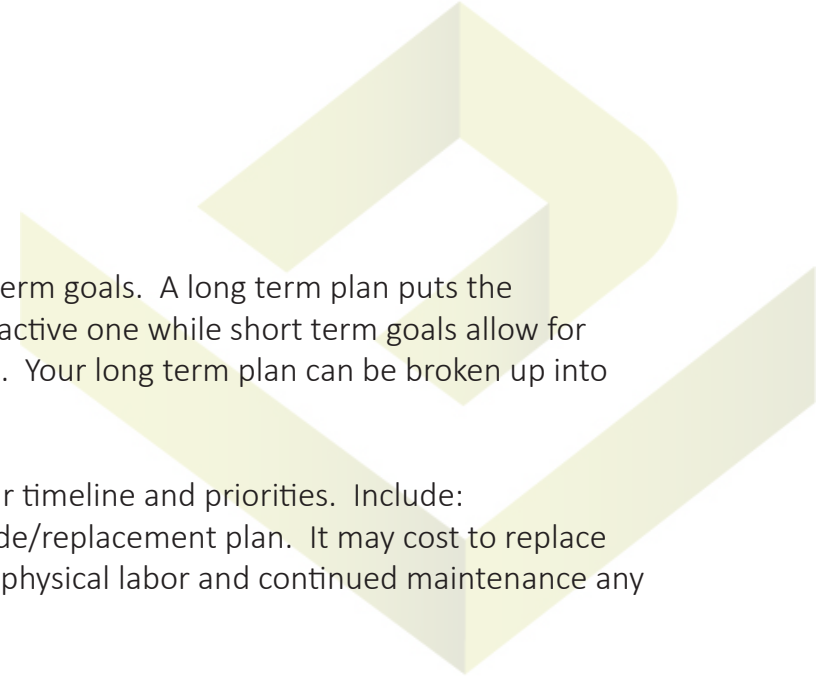
5. Create a Technology Plan

We have now arrived at the final step of the IT planning process- creating your actual Technology Plan.

Take a look back at the knowledge you've gained through the first four steps:
1. You should now know what it means for your organization to be successful and how IT supports your goals and objectives
2. You've assessed your current IT resources to know where you are versus where you want to be
3. Business needs have been defined and you have an idea of how to meet them
4. You've explored potential IT solutions to help meet your needs, overall goals, and get your resources to where you want them

Having all of these items aligned and knowing your needs ahead of time makes creating the detailed, strategic implementation portion much less daunting. Your plan should include the benefits, tasks and costs of implementation. Also include any risks that may need to be addressed.

Start by creating a timeline with long and short term goals. A long term plan puts the organization in a proactive state rather than a reactive one while short term goals allow for flexibility in the event of an unforeseen situation. Your long term plan can be broken up into phases, starting with highest priorities.

Next draft a budget. Take into consideration your timeline and priorities. Include:

- New equipment or an end-of-life upgrade/replacement plan. It may cost to replace equipment upfront but it could save on physical labor and continued maintenance any out of date machine may require.
- New software or cloud services (Saas)
- New employees, support services or training you may have designated as a need.

Consider not only the cost of the purchase, but also the time it will take to learn new software, perform backups, monthly updates, frequent security patches, and the potential for hiring experts to manage it all. Scheduled maintenance should be part of any organization's technology plan. At a minimum this will perform critical patches and updates on all equipment – hardware and software – and check that procedures are being properly maintained. A good maintenance program will also include remote network monitoring, providing economical 24×7 real-time analysis of all of your critical devices and services.

By taking the time to prepare an IT Plan and strategy, your organization may decrease spending and increase productivity if implemented correctly. A consultant may be able to offer cost-saving strategies and recommendations for your current infrastructure that could also result in improved efficiency.

Monitor performance of this plan allowing for small changes to be made as necessary and include evaluation criteria so you know when something is working and when it's not. You may break up your timeline by quarters and check in after each to analyze where you are in the implementation process. Is equipment in place and support team trained? Are you seeing increased productivity and measurable results as far as reaching the organizations overall goals? Hopefully the answer is yes!

With the rate of change in technology, repeating this process often is becoming a necessity. Knowing the state of your IT infrastructure can make all the difference – even things as little as how your emails are configured! It's never a bad idea to get a second or outside opinion.

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