

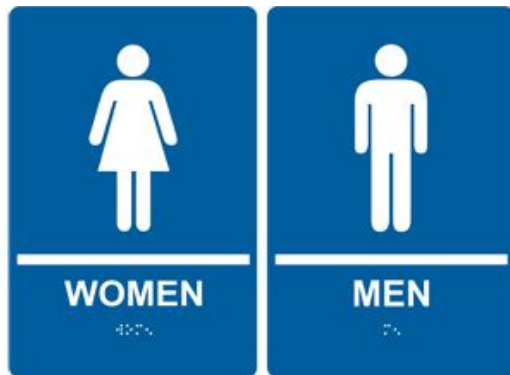
Strategy Into Action

Facilitated by the Enterprise Architecture team
on UW-IT Leap Forward Day
September 14, 2016

Welcome, Introductions, and Agenda

Agenda

Time	Topic	Overview
9:00 - 9:30	Why a Strategy Management Practice?	<ul style="list-style-type: none"> Activity: Table Talk
9:30 - 10:00	What is the New Practice? How do you apply it?	<ul style="list-style-type: none"> Activity: Draft a UW Strategy on a Page Artifact: A Strategy on a Page
	Break	
10:30 to Noon	Applying the Practice (Doing)	<ul style="list-style-type: none"> Activities: Draft drivers; Draft outcomes; Draft initiatives Artifact: A Strategy on a Page
Noon to 1PM	Lunch	
1:00 - 2:00	Compelling Stories	<ul style="list-style-type: none"> Activity: Draft a Compelling Story Artifact: A Story
2:00 - 2:45	Show and Tell	<ul style="list-style-type: none"> Activity: Share compelling stories
	Break	
3:00 - 3:45	Sustaining the Practice -- Next Steps	<ul style="list-style-type: none"> Activity: Using Your Strategy
3:45 - 4:00	Feedback on the Practice	<ul style="list-style-type: none"> Activity: + Δ ! ?



Why a Strategy Management Practice?

30 minutes

Shout Out: When you think about Strategic Plans...

Strategic Plans

Gartner identifies the worst case:

Strategies gather dust on the shelf. Strategies ... are often laborious explanations of what exists today rather than what the future needs to look like; ... **rather than a living document.** They failed to gain buy-in during the development process and thus became shelfware.

[Gartner: Getting Started with an Effective IT Strategic Planning Process](#)

Strategic Plans

Gartner identifies the word

Strategies gather dust
laborious explanations of
needs to look like; ... **ratio**
gain buy-in during the
shelfware.

[Gartner: Getting Started with an EA
Process](#)

**“People are afraid of
writing their strategy
down because they’re
afraid of being measured.”**

-- Betsy Burton, Gartner EA
Summit, April 2016

We need to demonstrate “Value for Cost” in IT...

- **To a variety of audiences:** UW Senior Leadership, UW-IT Governance Groups, our Expenditure Review Committee, etc...

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- **Through different lenses:** Services aligned to Business Capabilities, Project Spend aligned to Business Services, etc...

CEB and Gartner - Best and Worst Practices

Worst

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CEB Best Practices

Align business and IT planning cycles to collaboratively shape business strategy and inform IT strategy.

Design a **strategic goals cascade process** to translate corporate objectives into functional goals for IT.

Embed **agility and review triggers** in architecture roadmaps to improve the flexibility and relevance of your strategic plan.

[CEB: Improve Strategic Planning](#)

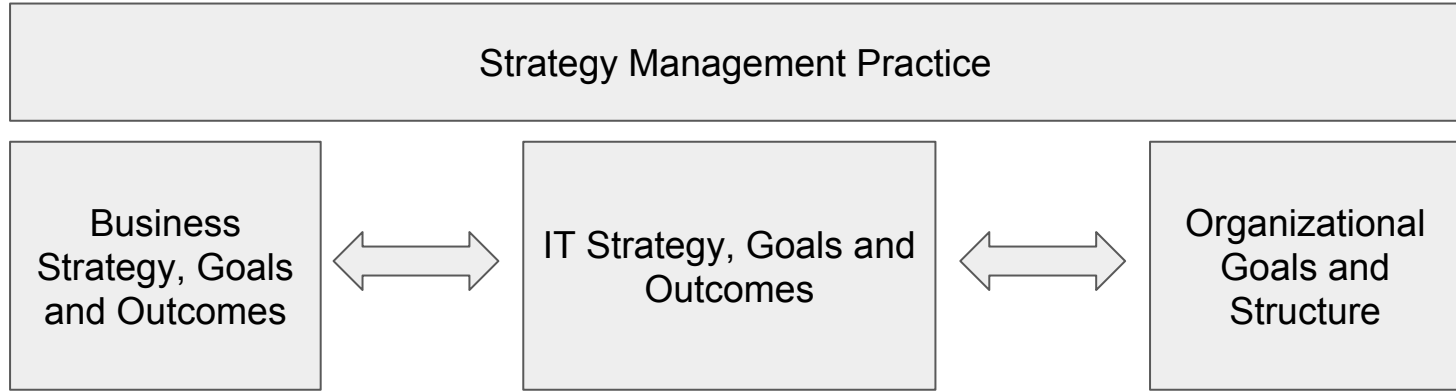
We don't need a strategic plan.



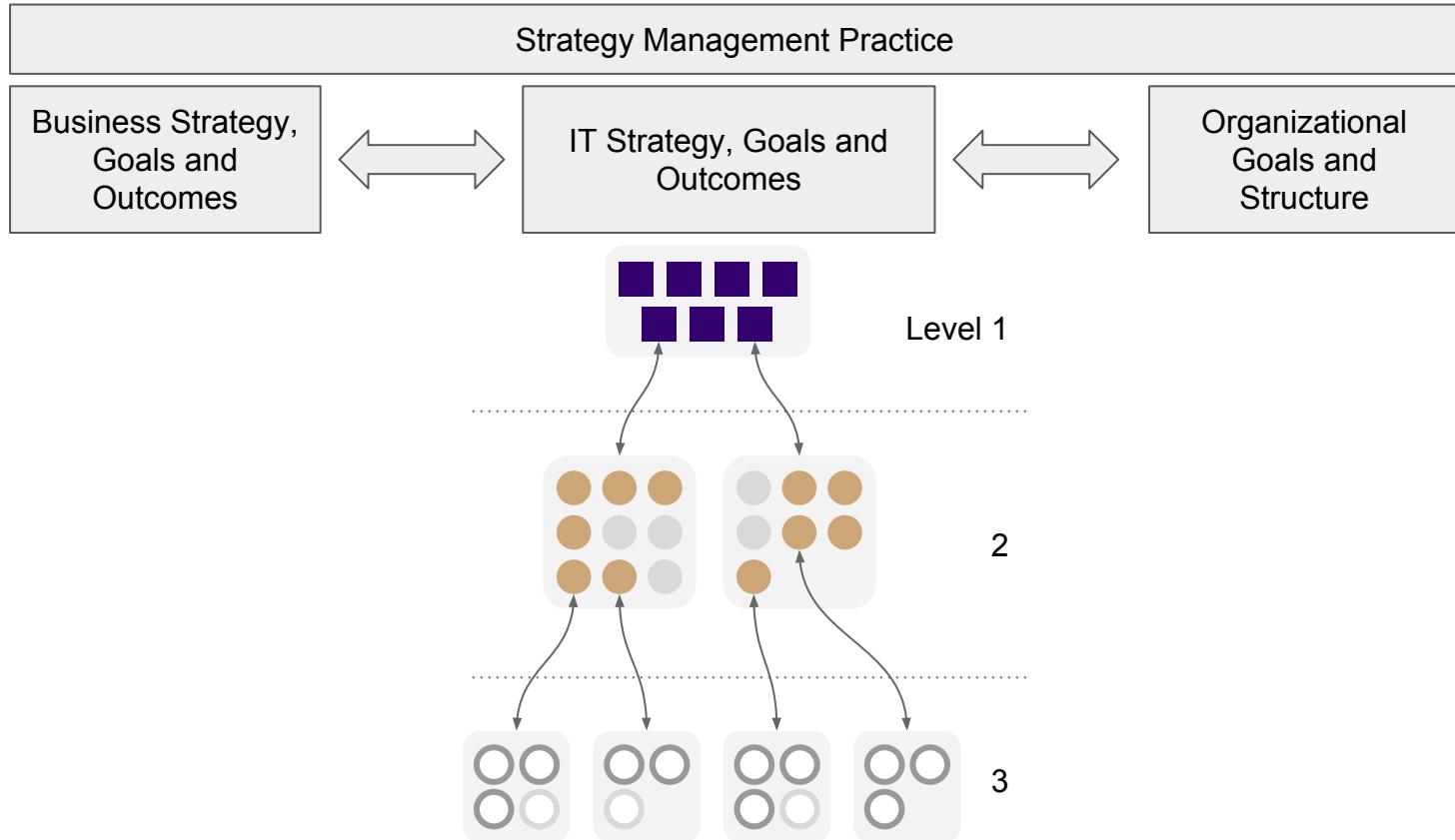
We need a Strategy Management Practice.

- **Living Strategy** - adapts and changes
- **Cascades** into the organization
- **Linked** to business strategy/goals/outcomes
- **Enables communication** with many groups across UW

We need a broad practice...



that is also deep.



Future State: Strategy Management Practice.

- **Living Strategy** - adapts and changes
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“I” Time - Table Talk

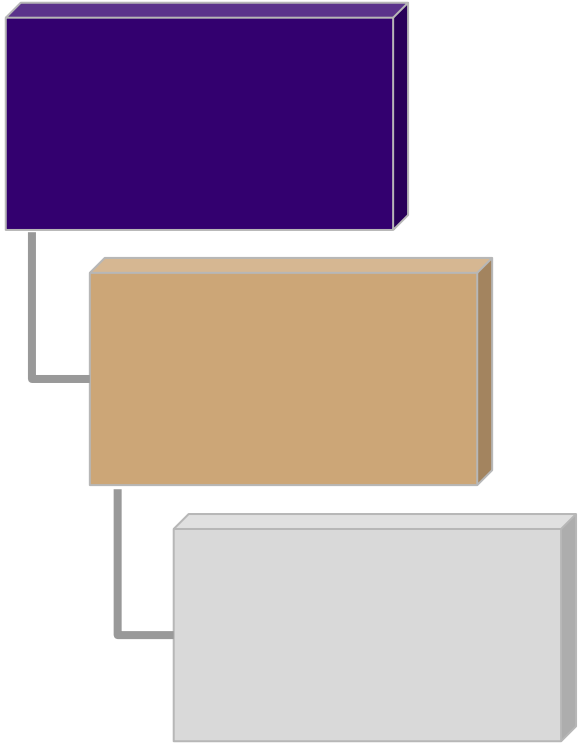
What would you want from a new Strategy Management Practice?

How would you use it?

How would it (could it) be different than a strategic plan?

Who would you involve? Would that be different?

Context for today



Levels of Strategy



Updated by the Senior Leadership Team.

Used for communication within UW-IT and with **university leaders**.

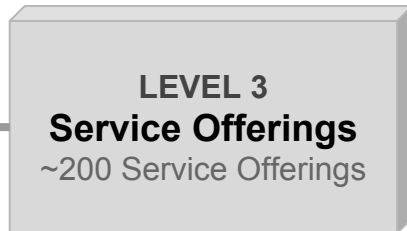


Levels of Strategy



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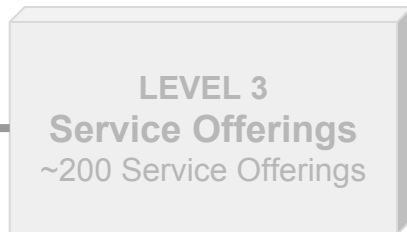
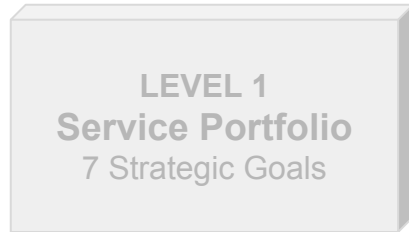
Used for communication within UW-IT and with **university leaders**.



Maintained by Service Owners in collaboration with their teams and their Business Service Owners.

Used for communication within UW-IT and with **customers and partners** who need to know the direction of individual service offerings.

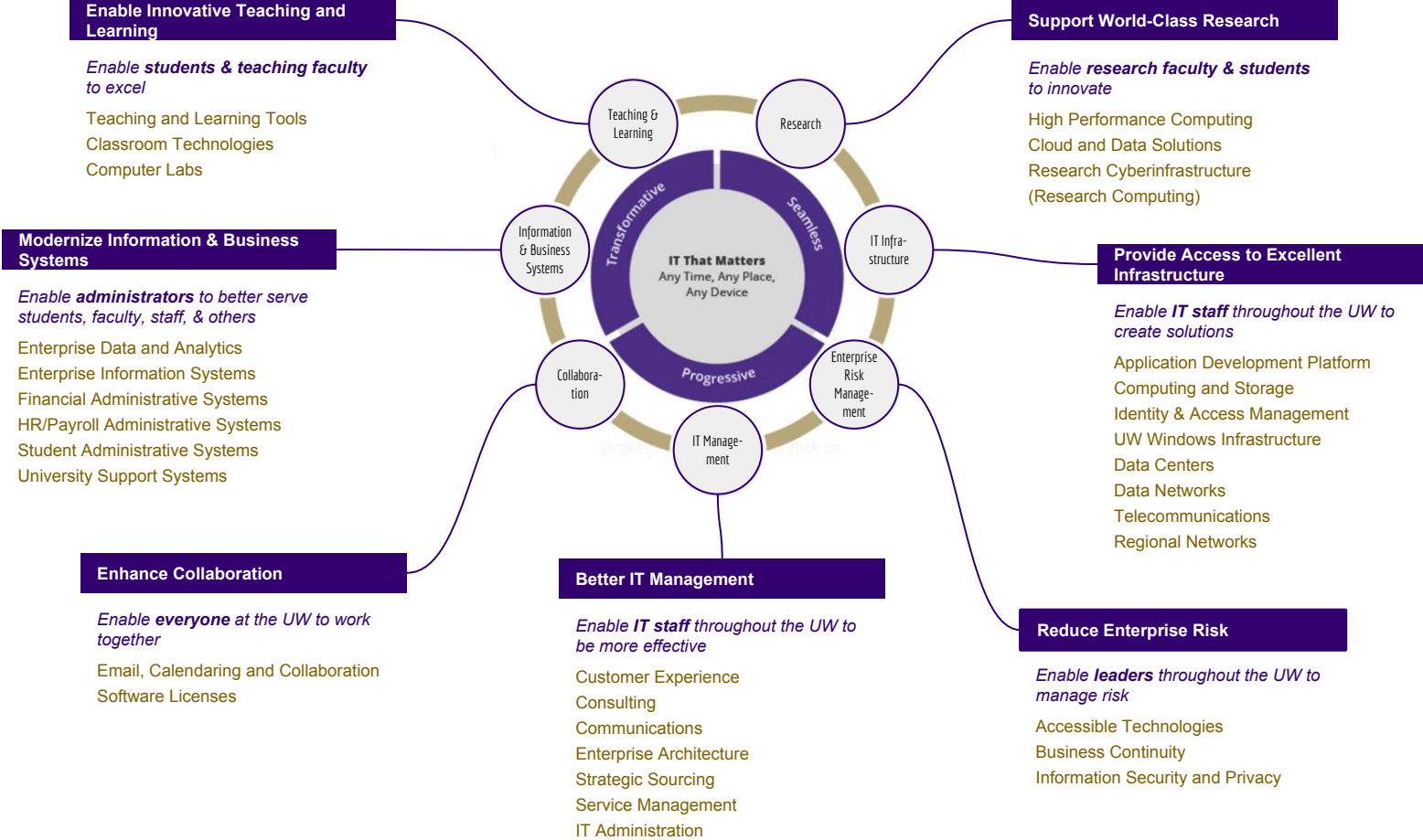
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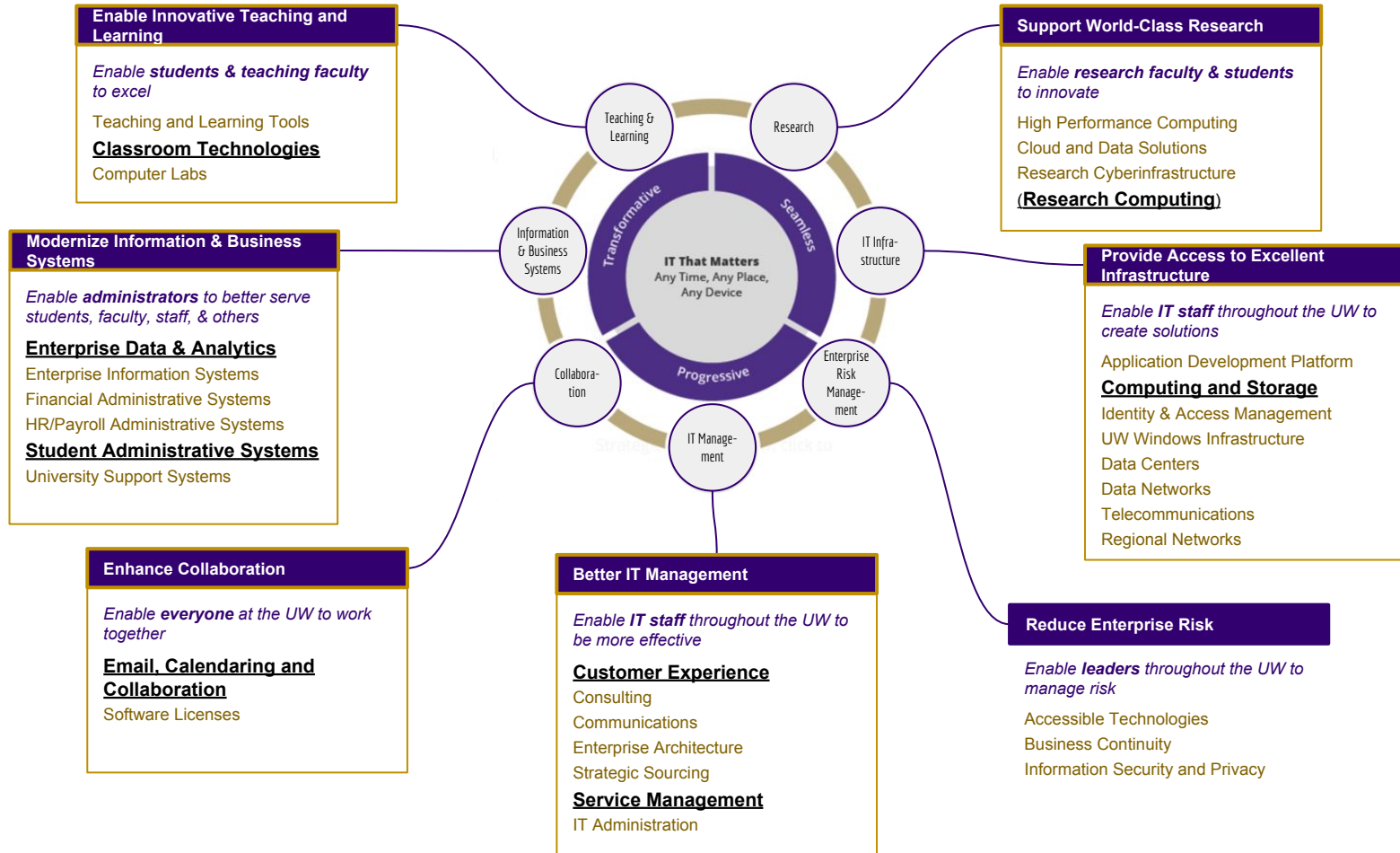
Updated by Business Service Owners in collaboration with Service Owners and their teams.

Used for communication within UW-IT and with **governance boards**, such as the IT Service Management Board, PRB, etc.

LEVEL 2: Business Services Support UW-IT Strategic Goals



LEVEL 2: Business Services Support UW-IT Strategic Goals



Business Services in Today's Workshop

Level 1 Strategic Goals / Service Categories	Level 2 Business Services (Business Service Owner)	Level 3 Service Offerings
Teaching & Learning	Classroom Technologies (Phil)	Audiovisual Systems Integration; Event Services; STF Technology Loan Program; Classroom Facilities Services
Research	Research Computing (Erik)	High Performance Computing, Cloud and Data Solutions, Research Cyberinfrastructure
Information & Business Systems	Enterprise Data & Analytics (Aaron)	Enterprise Data Warehouse; Enterprise Integration Platform; Data Definitions and Metadata; Reports, Cubes, and Visualizations
	Student Administrative Systems (Phil)	Advising; Curriculum Management; Enrollment and Registration; Financial Aid Management; Professional and Continuing Education Management; Recruiting and Admissions; Student Financial Account Management; Student Self-Service
Infrastructure	Computing and Storage (Brad)	Standard Managed Servers; UW Central File Storage Service for Users - The U-Drive; Managed Workstation; Data Backups and Archives; Campus KeyServer (K2); Computer Vet; Storage Area Network (SAN) Data Storage
Collaboration	Email, Calendaring, & Collaboration (Erik)	UW Office Directory; Software Licensing; Bulk Email; Google Collaborative Applications; Mobile UW; UW Deskmail; Notify.UW; Catalyst Web Tools; Enterprise Portal; Campus Event Calendars; Email Lists (Mailman); SpaceScout; Wiki; MSCA (Microsoft Collaborative Applications)
IT Management	Service Management (Brad)	Service Management, CSS Decommissioning Service, UW Connect Metrics Reports
	Customer Experience (Karalee)	TBD (proposed)

What is the new practice?

30 minutes

What is a Strategy?

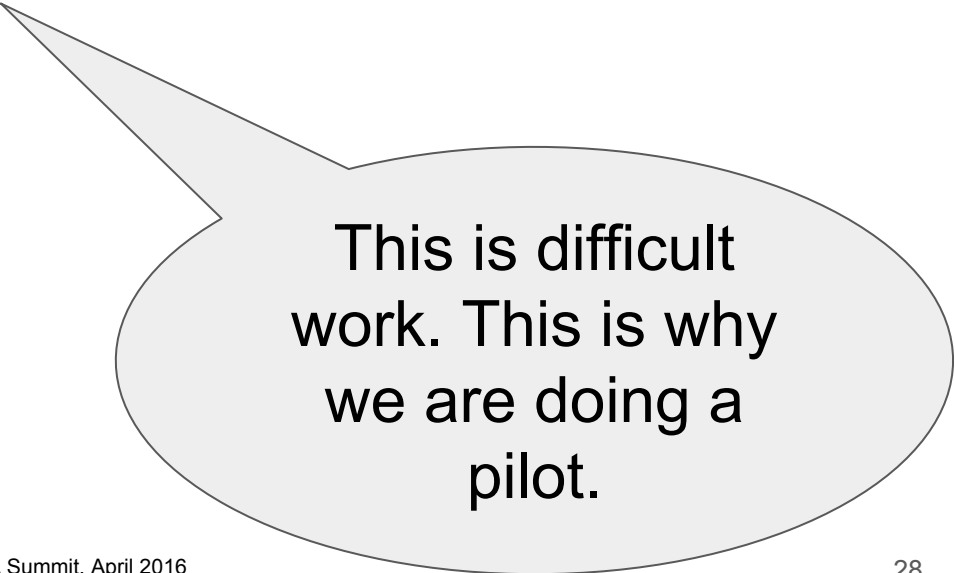
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What is a Strategy?

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This is difficult work. This is why we are doing a pilot.

What makes up a strategy?

Why? Mission and Vision		
Why? What is driving change?	How are we going to get to the future?	What? What will be different in the future?

Strategy on a Page Format

v.0.# updated 9/6/16 - First draft version

Strategy Statement: To enable ____, we ____.

Vision: *What is the future you envision as a result of your strategy?*

Change Drivers:

What big changes in the environment are driving your strategy -- business, technology, financial, etc.?

Initiatives:

What are you doing in response to your drivers to create different outcomes?

Current

- *Approved active business cases*

Planned

- *Approved business cases, not active yet*

Future

- *Proposed business cases*

Outcomes:

What will be different as a result of your initiatives? What business value will result?

Creating and Sharing Strategies

- Strategies use a **standard format** (“strategy on a page”) to facilitate communication
- Strategies are **written down** so they can be shared
- Strategies are expressed in a **concise** way to be more accessible and digestible
- Strategies will be **published in a common place** so teams can see each other's' strategies and drill up and down

Your strategy won't use just this format

- **Compelling stories** can be created from it
- It can be enhanced with **other analyses**
 - e.g., brick diagrams, roadmaps, value chain, personas, etc.

Your strategy isn't just this document

- It is the **process**.
- It is the **conversation**.
- It is the **buy-in**.
- It is the working together to gain a **shared understanding**.
- For these reasons, the **document invites change**.

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Identifying Drivers

Strategy Statement: To enable ____, we

Vision: *What is the future you envision a*

Change Drivers:

What big changes in the environment are driving your strategy -- business, technology, financial, etc.?

Sources of drivers can include:

- UW strategy and goals: [Sustainable Academic Business Plan](#) (excerpts in your handout)
- UW-IT strategic goals: [Strategy Into Action wiki](#) (in your handout)
- Your knowledge of the strategies and goals of the UW units you serve
- Your knowledge of technology drivers

Identifying Outcomes

The concept of SMART goals can help define outcomes:

- **Specific**
- **Measurable**
 - Binary: “Students will be able to _____.”
 - Directional: “Customer satisfaction with _____ will be improved.”
 - Quantitative: “Researcher adoption of _____ will increase by 10%.”
- **Agreed-Upon / Actionable**
- **Realistic**
- **Time-Based**
 - Think in terms of the current and next fiscal year

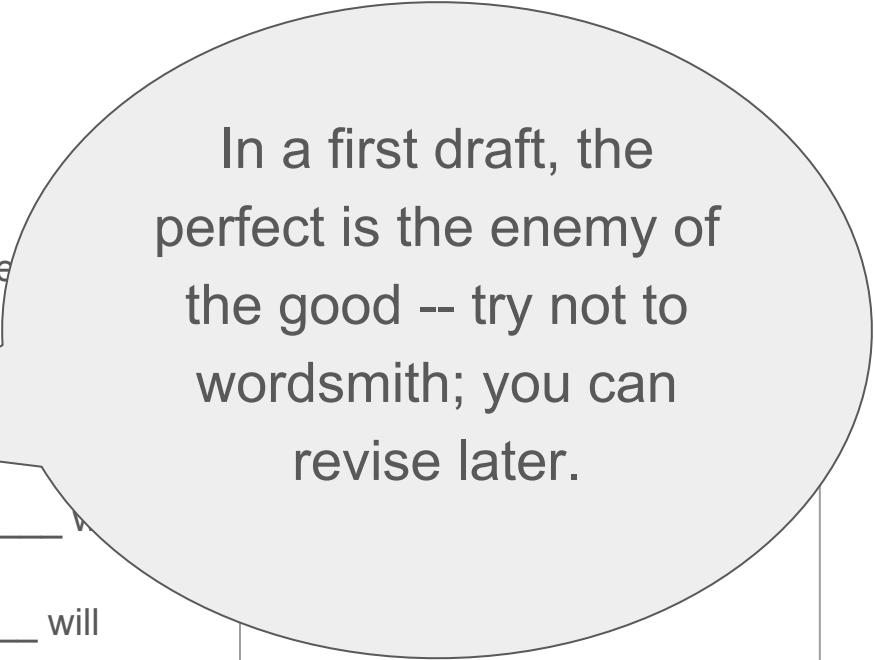
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In a first draft, the perfect is the enemy of the good -- try not to wordsmith; you can revise later.

Examples - Drivers and Outcomes

Driver	Initiative	Outcome
Version 8.3 will be released in Fall	Install Version 8.3	We have installed Version 8.3

Driver	Initiative	Outcome
Enrollment in online courses is expected to grow 10x over the next 10 years	Update the enterprise learning management platform to the latest release	Faculty are able to successfully manage large online classes using updated learning management tools

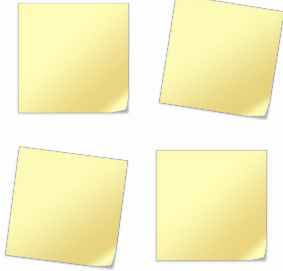
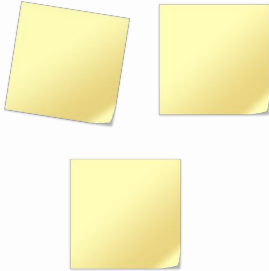
“I” Time - Table Talk

What change drivers do you see for the UW?

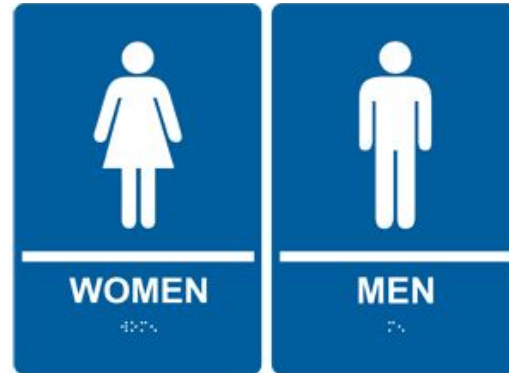
What outcomes do you think the UW is striving for?

UW Strategy on a Page
v.0.1 updated 9/9/16 - Blank template for workshop

Strategy Statement: Preserve, advance and disseminate knowledge through research, education and service.
Vision: The UW of the 21st Century is more competitive, collaborative, technology adept, nimble and diversified. Committed to strategic priorities of maintaining quality, staying true to our mission and providing solutions to society's most pressing issues.

Change Drivers: 	Initiatives: <ul style="list-style-type: none">• Community Engagement• Institutional Assessment• Teaching & Learning• Husky Experience• Population Health• Transforming Administration• Innovation Imperative• Race & Equity• Tri-Campus	Outcomes: 
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Break



Applying the Practice

90 minutes

Pick a Scribe

<http://goo.gl/scJViM>

Create a Draft Strategy on a Page

Created by Jim Phelps, last modified by Piet Niederhauser on Aug 30, 2016

Start here: [Create a Strategy on a Page](#)

Sequence

Drivers

- Think about drivers individually
- Discuss drivers as a group

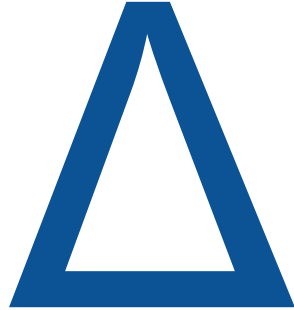
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Initiatives

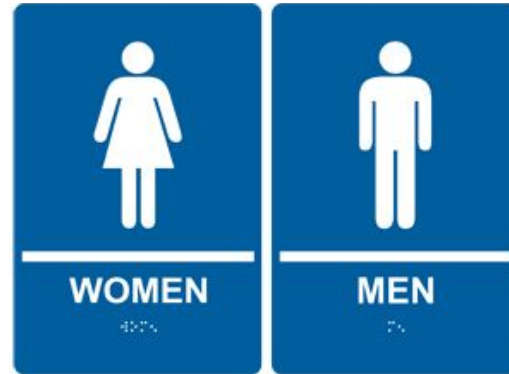
- Add initiatives as a group -- no need to list everything in this initial draft!
- In particular, what future initiatives might be needed?

Feedback for the Practice



Lunch

60 minutes



Compelling Stories - Introduction

75 minutes

Why do you need one?

- **Remove the hesitation** when asked: “what do you do?”
- Clarify vision and strategy by adopting a **consistent vocabulary**
- **Inspire** your team and others to support your vision and act on your strategy

Remember from
earlier...

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- **To a variety of audiences:** UW Senior Leadership, UW-IT Governance Groups, our Expenditure Review Committee, etc...
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Core elements of a compelling story

- **It's sticky:** your target audience will remember the story after the conversation.
- **It's relevant:** it couches your product in a light that matters to the listener.
- **It's outcome-oriented:** It focuses on results, not execution details

- **If the story perfectly describes the strategy, but the strategy is irrelevant to the listener, the story has failed.**

Metaphor example

Metadata is: . . . structured information that describes, explains, locates, or otherwise *makes it easier to retrieve, use, or manage an information resource*.

Transforming system data from this:



To this:



- Contents
- Where it was canned
- Expiration date
- Nutritional information
- Weight
- Recipes, etc...

Helping you find it here:



So you can make this:



Two-sentence stories; from Steve Jobs

On market share and differentiation:

“Apple’s market share is bigger than BMW’s or Mercedes’s or Porsche’s in the automotive market. **What’s wrong with being BMW or Mercedes?**”

On innovation:

“What we want to do is make a **leapfrog product** that is way smarter than any device has ever been, and super-easy to use. This is what the iPhone is, OK? So, we’re going to **reinvent the phone.**”

On future scope and vision of technology:

“You’ll see more and more perfection of that - computer as servant. But the next thing is going to be **computer as a guide or agent.**”

Summing up:

- Select an image or idea the audience can relate to
 - Make a technical topic easy to understand and remember
- Focus on the outcome, not the journey
 - Take an abstract goal and make it real



If you were to put your strategy in a box, what would you want the package to say about it?

Table Work

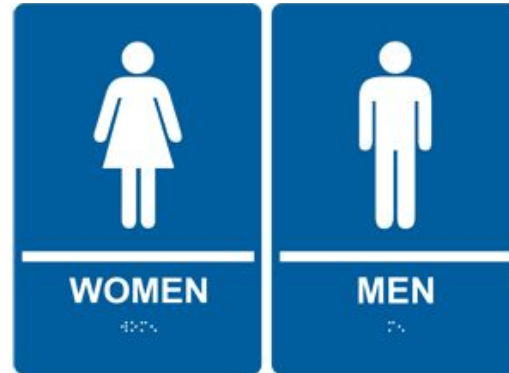
30 minutes

Shift & Share

30 minutes

Visit 3 different tables to hear their story

Break



Sustaining the Practice -- Next Steps

45 minutes

Service Management Board

- Tim Rhoades, Chair

Using Your Strategy

Your Strategy on a Page is a communication and planning tool, not just a static document.

Ways to use it include:

1. Within teams -- integrate it with other team work
2. With other teams -- communicate with partner teams, customers, management, distributed IT
3. Support business cases with strategy → PRB
4. Receive and incorporate direction from the Service Management Board

Practical Challenges

- As a large organization, we have many communication needs
- Strategy is defined at multiple levels of the organization
- Strategies change at different rates
- We need to be able to manage multiple levels of strategy
- Governance committees such as the IT Service Management Board need more actionable information

I-Time, Table Talk

Over the course of a year, how do you want to use and maintain your business service strategy, within your team and with others?

What is your next step?

How often will you need to refresh this content?

What do you need from levels above and below? What will you need to provide up and down and side-to-side?

Next Steps

- Today: Pilot workshop
- September-October:
 - Complete the first published version of each Business Service strategy
- October-November:
 - Hands-on workshop for teams to work on Service Offering strategy

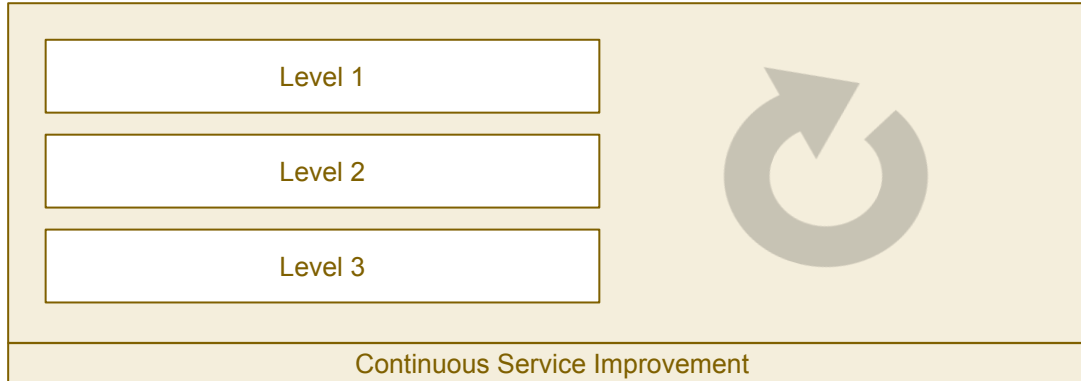
Strategy and Related Cycles

Project Portfolio Management Cycle

Abstracts > Charters > Project Plans > Execution > Closure



Strategic Planning Cycle



IT Governance Cycle

Service Management Board > TRF > Service Investment Board

Goals of the Strategy Management Practice.

- **Living Strategy** - adapts and changes
- **Cascades** into the organization
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Personal Reflection

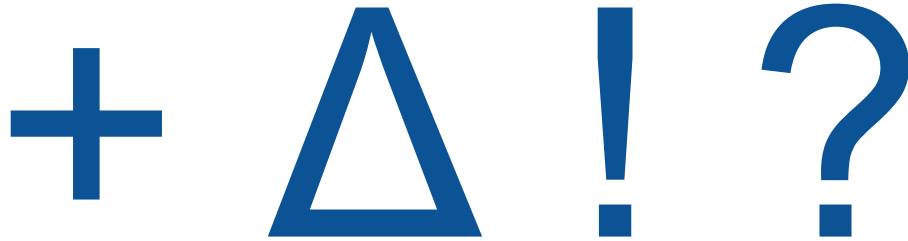
What new realizations did you have today?

What would you like to apply from today?

What will you do next?

Feedback for the Practice

15 minutes



Thank you for participating

The EA Team:

Jim Phelps, Director EA & Strategy

Rupert Berk, Enterprise Solutions Architect

Piet Niederhausen, Enterprise Business Architect

Ray Polakovic, Enterprise Information Architect

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