

# Implementing Effective IT Governance and IT Management

A Practical Guide to World Class current and emerging Best Practices

**2ND, REVISED EDITION**

Areas of Work	Description/Components	Deliverables
<b>Business Plan/ Objectives (Demand Management &amp; Alignment)</b>	<ul style="list-style-type: none"> <li>Strategic Business Plan – Vision, Objectives, Financials, Operations, SWOT, Imperatives (Must Do's), Initiatives (Alternatives that Support Imperatives), etc.</li> <li>Capital Planning/Expense Planning &amp; Budgeting</li> <li>Business Performance Management (Key Metrics)</li> <li>Executive and Other Steering &amp; Review Councils; Organization Structure</li> </ul>	<ul style="list-style-type: none"> <li>Plan</li> <li>Finan</li> <li>Balar</li> <li>BCG;</li> <li>Dave</li> </ul>
<b>IT Plan, Objectives, Portfolio Investment and Approvals (Demand Management &amp; Alignment)</b>	<ul style="list-style-type: none"> <li>IT Plan is aligned with the Business Plan – IT Capital/Expense Budget</li> <li>IT portfolio investment, rationalization, selection, prioritization, funding and approval Portfolio Management Model (for New, Change Programs and Projects and/or Operational and Infrastructure Functions)</li> <li>Fund major initiatives</li> <li>IT Performance Management (Define Metrics and Measurement Criteria)</li> </ul>	<ul style="list-style-type: none"> <li>IT Str</li> <li>Portfo</li> <li>(Inve</li> <li>Enga</li> <li>Busin</li> <li>Auth</li> <li>McFa</li> <li>Selig</li> </ul>
<b>IT Plan Execution &amp; Delivery (Resource &amp; Execution Management)</b>	<ul style="list-style-type: none"> <li>Program, Project and Operating Plans (Capital Plans, Project Plans and Budgets)</li> <li>Policies, Standards, Guidelines &amp; Processes (e.g. Management Control, Enterprise Architecture, Security, PMO, ITIL, Privacy, Cloud Computing, Data Management, etc.)</li> <li>Processes ( PMO, Help Desk, Security, Administrative SOPs, Workflows, Change, Risk, Data Management, etc.)</li> <li>Financial, program, project, application, maintenance and operational accountability</li> </ul>	<ul style="list-style-type: none"> <li>Asses</li> <li>PMB</li> <li>SCRU</li> <li>Lean</li> <li>ISO s</li> <li>etc.</li> <li>Infras</li> <li>Integ</li> </ul>
<b>Performance Management, Controls, Risk, Compliance and Vendor Management (Execution Management)</b>	<ul style="list-style-type: none"> <li>Manage and measure plans, budgets, programs, projects, operations &amp; risks</li> <li>Define and track key performance indicators (KPI)</li> <li>Compare plans to actuals and take appropriate corrective actions</li> <li>Outsourcing and Vendor Selection, Tracking, Measurement</li> <li>Business and IT Continuity, Security, Privacy, Contingency and Disaster Recovery</li> </ul>	<ul style="list-style-type: none"> <li>Balar</li> <li>Perfo</li> <li>RFI, F</li> <li>Mana</li> <li>Sarba</li> <li>Mana</li> </ul>
<b>People Development, Continuous Process Improvement &amp; Learning</b>	<ul style="list-style-type: none"> <li>Human capital development/Leadership Succession</li> <li>Organizational, Project &amp; Operational Maturity Models and Standards</li> <li>Managing Change and Transformation (e.g. culture, interoperability)</li> <li>Training and Certification (e.g. Individual and Organizational)</li> </ul>	<ul style="list-style-type: none"> <li>Adop</li> <li>Indus</li> <li>Pract</li> <li>PCMI</li> <li>Six Si</li> <li>Caree</li> <li>Succ</li> <li>Certif</li> </ul>

Dr. Gad J. Selig PMP, COP

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## Implementing Effective IT Governance and IT Management

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# **Implementing Effective IT Governance and IT Management**

**A Practical Guide to World Class Current  
and Emerging Best Practices**

**Expanding the IT Ruler on How to Align, Plan, Deploy and Govern Information  
Technology Resources for Improved Competitive Advantage, Integration with  
the Business, Profitability and Control in Global Enterprises**

**2nd Edition**

**Dr. Gad J. Selig, PMP, COP**



# Colofon

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# Foreword One

Effective IT governance and management, that is closely aligned to the business needs and supported by a strong business partnership, is extremely vital to the success of the IT function within corporate enterprises and on a global basis. Dr. Selig's book on this very topic is a great resource for all IT practitioners, senior business professionals and brings together every critical aspect relating to IT governance.

The second edition lays out a roadmap to executing within a solid governance model. It looks at all aspects of establishing, planning, implementing, growing and sustaining an IT ecosystem. The combination of case studies and disciplined approaches to building well-structured processes, committed leaders and change agents will help the board, executive management and most of all, CIOs and IT professionals think through what has worked, what can work and how to deploy IT governance successfully.

Being a CIO for many years in a highly competitive industry, I have developed a respect for the process side of running IT like a business. There has always been a need to balance governance for IT with the demands and services needed to support the business. This requires effective implementation of guiding principles and controls to ensure corporate enterprises optimize their investments and, more importantly, ensures that all IT resources are well organized and utilized to help drive business value.

In my experience, Information Technology and its effective management is a fundamental cornerstone of any well-run business. Ensuring that the IT function is fully supporting the business strategy and goals of the company is all about ensuring that the IT organization, processes and performance are designed with a view to constantly providing and measuring business value. Successful CIOs recognize that IT has become far more than a means of increasing efficiency and reducing costs. Rather, they see IT as a prime stimulus for, and an enabler of, business innovation and transformation – and they themselves are viewed as key collaborators, facilitators and partners in a process that develops business and IT strategies in concert.

Ever since the recent economic recession, coupled with the growing reliance on social media and mobile - one thing we are sure of is that “Change is the New Norm”!

Therefore, never before has it been more critical to cultivate a holistic management model for the information technology function that is well aligned to the business needs. Business today is faced with far more rapidly changing and challenging market conditions, industry disruption, ever-changing regulations, the need for accessible analytics and more demanding and impatient customers. In parallel to this, new technology approaches such as cloud, digital, mobile, ‘big data’, Internet of Things, and visual analytics, all present new ways of doing things that, therefore, challenge the status quo. These external challenges, coupled with the new technology opportunities, along with the need to support normal business demands such as; to market and administer a new product quickly, scale and protect the core infrastructure and company data, drive company change, all taken together elevate the dependency that successful businesses today have on technology and hence highlights the need for a strong and comprehensive governance model between IT and the business. IT practitioners today have to work with an ever-changing business and IT landscape, where the pace of change is tremendous, business competition and demand for IT services is extremely high, budgets are challenged and talented technical resources are always scarce – this book should help provide some innovative insights into IT governance in an era of change and complexities!

I have known Dr. Selig for more than five years and have enrolled members of my senior staff onto an IT governance seminar led by him. He is a seasoned IT veteran who has organized a set of proven, fundamental approaches for the IT professional and has a passion for sharing these approaches. In this book, Dr. Selig combines practical business experience and practices along with academic principles, which together provide a valuable and insightful contribution to help advance the role of IT and its value to the business. Whether you are a board member, a CEO, a practicing CIO, or a student of IT, this book will provide a reference and guide to ensure that your IT function is well aligned to your business needs and is well managed and governed to achieve maximum business value for your organization.

Ursuline Foley  
Enterprise/Corporate CIO  
Major Insurance/Reinsurance Company

## Foreword Two

Dr. Selig's second edition of the book on IT governance is an excellent addition to the knowledge base focused on the business of information technology. It is an excellent compilation of practical and useful information on the governance of IT in business and government.

The book highlights many of the concepts I have endorsed and encouraged for years as well as new ideas and information. The book is comprehensive and written in a reader-friendly way.

I look forward to recommending this book to readers at all levels in my client organizations dealing with the issues, and looking for solutions, in the complex and fast-changing world of IT governance.

IT governance offers you the who, what, where, when, and how to properly organize, plan, align, manage, and measure the effectiveness of the IT function in any organization. Dr. Selig provides a good balance between the people, technology, and process challenges essential to optimizing IT as an expensive corporate asset.

The book reinforces the fact that IT is not an independent organization silo. It must be aligned and integrated effectively with the business, and in government the mission, throughout the organization. Dr. Selig shows the balance - that IT supports the business or organization mission, but also, when properly aligned, managed, and resourced, will enable the organization to prosper, innovate, and grow effectively.

I have known Dr. Selig more than 25 years as a client, Alliance Partner, and good friend. He is a seasoned educator and business, consulting and IT veteran. He has organized a set of fundamental approaches for the IT professional and business and government executives. In this book, Dr. Selig's practical experience as a leader provides a valuable contribution to advance the field. Whether you are a board member or CEO, a practicing



CIO, or a student of IT, this book will guide you through complex business, process and technological roadmaps that work.

Dr. Selig's book is an excellent reference source in a critical area with many fast-changing parts. It is a must-have for teachers, executives, and managers dealing with IT.

John A. McCreight

Founder & Chairman

McCreight & Company, Inc. ~ CIO Group, LLC ~ Board Effectiveness Partners, LLC ~  
Second Opinion, LLC

# Introduction

The issues, opportunities and challenges of aligning information technology more closely with an organization and effectively governing an organization's Information Technology (IT) investments, resources, major initiatives and superior uninterrupted service is becoming a major concern of the board and executive management in enterprises on a global basis. Information technology (IT) has become an integral part of many organizations and is fundamental to sustain growth, innovation and transformation and support continuing operations in most organizations. Therefore, an integrated and comprehensive approach to IT governance is required, which includes all the activities of business/IT alignment, global resource planning, execution and governance of IT as well as the leadership of those entrusted with the task. Effective 'management' includes the activities of planning, investment, integration, measurement, innovation and business transformation, deployment and services required to manage a complex strategic asset.

The author views IT governance as the focal point for more effective IT management around which there are many important issues such as alignment, leadership, planning, execution, accountability, metrics and related topics. In other words, superior IT governance represents the path to world class IT management practices.

None of this is easy, or obvious, and this pragmatic and actionable 'how to guide' is intended to pull together, from about 200 sources, current and emerging best practices and draw from over twenty IT governance best practice case studies. Some of these case studies are included in the book.

Effective IT governance represents a journey (not an end state in itself), which focuses on sustaining value and confidence across the business. Today, many companies start on a narrow path or shotgun approach and focus on the compliance component (e.g. Sarbanes-Oxley and others) of IT governance, without developing a more comprehensive framework with a prioritized roadmap based on the highest value delivered to the organization.

In reviewing the current literature, completing over twenty case studies and conducting numerous private and public IT governance workshops and consulting assignments both domestically and internationally over the past few years, attended by thousands of executives, managers and practitioners on IT/business alignment, planning, deployment (e.g. program/project management, IT service management, outsourcing, cloud computing, data management, etc.) and governance (e.g. performance management and control), much has been written and documented about the individual components of IT governance. However, much less has been written about a comprehensive and integrated IT/business alignment, planning, execution and governance approach that represents a balanced approach consisting both of a strategic top-down framework and roadmap together with bottom-up implementation principles and practices that address the broad range of IT issues, constraints and opportunities in a planned, coordinated, prioritized, cost effective and value delivery manner.

The purpose of the book is not to repeat in greater details what has been published previously, but to describe each of the major components in an overall comprehensive framework and roadmap in sufficient detail for executives, managers and professionals. It is hoped that the book can serve as a guideline for any organization in any industry to formulate and tailor an effective approach to IT governance for its environment and to help transition the IT organization to a higher level of maturity, effectiveness and responsiveness.

The second edition of the book contains a new chapter on cloud computing, data management and governance, updates to the case studies and new material. Throughout the entire book the text has been updated on leadership, transformation, AgilePM and Scrum, ITIL 2011 Edition, performance management, risk management, CGEIT (COBIT IT Governance), cloud sourcing, security, select ISO standards related to IT governance and other topics.

## ■ THE MARKET FOR THE BOOK

Many executives, managers and practitioners have expressed the need for a comprehensive, yet practical guide, based on real world experiences, on the subject of implementing IT successfully.

The book has been written by a former business and IT executive and practitioner who has managed businesses and IT organizations, managed strategic change and advised major public and private organizations on business and IT strategy and governance. He has also completed numerous consulting assignments, conducted private and public workshops and graduate business and engineering courses on the fundamentals of managing and implementing strategy, innovation, management, IT strategy formulation, governance and transformation of IT to integrate seamlessly with the business.

Our intended audiences include the following groups:

- **Directors of corporate boards** – who have overall fiduciary accountability to provide oversight for the business and key functions of the business.
- **Executives** – who are primarily responsible for developing and/or approving business/IT strategy and then overseeing its implementation and governance (the ‘C’ suite of corporate officers).
- **Managers and professionals** – who are primarily responsible for implementing and governing IT in their organizations and institutions,
- **Consultants and other advisors** – who are involved in advising, planning, organizing, directing and governing IT initiatives to help transform businesses and organizations to compete more effectively around the world
- **Academics, graduate and upper level undergraduate students** – who must teach and master a fundamental understanding of IT and how it impacts businesses, management, employees, the regulators and investors.

The demand for an updated comprehensive, pragmatic and actionable ‘how to’ guide to help managers and practitioners plan, deploy and sustain an effective IT governance and management environment and culture has been expressed by many managers and professionals in the private, public and academic sectors.

## ■ ORGANIZATION OF THE BOOK

The book is divided into two parts and ten chapters, which cover the three critical pillars necessary to develop, execute and sustain a robust and effective IT governance and management environment - leadership, people and organization, flexible and scalable processes and enabling technologies.

Part I covers the overview, business/IT alignment, strategic planning, demand management, the integrated IT governance framework and leadership, teams and organization. Part II covers the process and technology topics including: execution and delivery management (includes program/project management, IT service management and delivery with IT Infrastructure Library {ITIL} and strategic sourcing and outsourcing); performance measurements, risk and contingency management (e.g. includes COBIT, the balanced scorecard and other metrics and controls), cloud computing, data management and enabling technologies.

### **Part I Business/IT Strategy, Alignment, Leadership, Teams and Organization**

Part I of the book focuses on the chapters covering business/IT strategy, alignment, leadership, teams and organization required to develop and execute an effective IT governance environment. It focuses on the strategy formulation, people and organizational aspects.

## **Chapter 1 Introduction to IT/Business Alignment, Planning, Execution and Governance**

Covers the key IT/business alignment, integration, planning, execution, governance issues, constraints and opportunities; discusses the roles of the board, executive management and practitioners; reviews the value propositions for IT governance, provides an overview of demand management, decision rights, balanced scorecard metrics and how much governance is required; reviews select regulations and their compliance requirements; identifies the steps in making IT governance real and provides an assessment technique to determine the current level of IT governance maturity in an organization and illustrates a blueprint of a future state of IT governance. It also covers functional and IT components related to governance such as platform, infrastructure, application development, operations, security and related topics.

## **Chapter 2 Overview of a Comprehensive IT Governance and Management Framework and Select Industry Current and Emerging Best Practice Frameworks, Standards and Guidelines**

Describes and illustrates a comprehensive IT alignment, execution framework and its major components. References and brief descriptions of related current and emerging industry best practices, standards and guidelines, including maturity models are discussed such as COBIT, Strategic Planning, ISO 9001 (Quality), ISO 20000 (IT Service Management), ISO 27002 (IT Security), ISO 38500 (IT Governance) and ISO 31000 (Risk Management), PMI's PMBOK Guide v5, PMI's Standard for Program Management v3, PMI's Standard for Portfolio Management v3, Project and Portfolio Management, AgilePM (Project Management) and Scrum, CMMI, People-CMM, ITIL 2011 Edition, PRINCE2, PMMM, ITIM, VAL-IT, ISO 21500 (Guidance on Project Management), SDLC/IDLC, Lean & Six Sigma, eSCM, OPBOK, Baldrige, Lean IT, TOGAF, BABOK Guide, BISL, the balanced scorecard, related professional certifications and others and how, if followed, they can result in more effective IT governance and management.

## **Chapter 3 Business and IT Alignment, Strategic/Operating Planning and Portfolio Investment Management Excellence (Demand Management)**

Covers the business and IT strategic planning cycle, executive steering groups, business/IT integration maturity model, IT planning through execution management flow, IT investment portfolio selection and prioritization attributes and VOC engagement model.

## **Chapter 4 Principles for Managing Successful Organizational Change, Prerequisites for World Class Leadership and Developing High Performance Teams**

Covers key leadership, talent, people and soft skills and competencies required for success. It also covers the attributes of successful traditional and virtual teams in a global environment. It discusses technologies used by virtual teams located anywhere. It also reviews a framework for managing successful change in helping to transition and transform organizations to higher levels of IT maturity and effectiveness. It also covers

the shadow IT organization and structure and how to strength the partnership between more sophisticated IT technology users and the IT organization.

## **Part II IT Governance and Its Critical Processes and Enabling Technologies**

Part II of the book focuses on the chapters covering project management, IT service management, outsourcing, cloud computing, big data management, analytics and metrics related to IT governance.

### **Chapter 5 Program and Project Management Excellence (Execution Management)**

Program and project management is a major component of effective IT execution management. It discusses the right and pragmatic ways to manage programs and projects within a flexible and scalable process, accommodating both fast track and complex initiatives. It provides multiple checklists, templates and metrics to help deliver programs and projects on time, within scope, within budget, with high quality and to the customer's satisfaction and/or get them back on track. It references a self-assessment maturity model that can be used to assess the current and target the future maturity level of an organization and suggests a transition plan to get there. It also covers Agile project management and Scrum.

### **Chapter 6 IT Service Management (ITSM) Excellence (Execution Management)**

Describes the principles and practices of IT service management and operations providing an overview of ITIL 2011 Edition (IT Infrastructure Library), its processes and components. Specific objectives, benefits, and key performance indicators are covered. It illustrates a self-assessment maturity model that can be used to assess the current and target the future maturity level of an organization and suggests a transition plan to get there.

### **Chapter 7 Strategic Sourcing, Outsourcing, Vendor Management and Excellence**

Provides the fundamentals of strategic sourcing and outsourcing such as issues, concerns, opportunities, value propositions, outsourcing lifecycle, the outsourcing business case, risks, modes of outsourcing (e.g. on-shore, rural shore, near shore, off shore, best shore, etc.), vendor selection, due diligence, contract negotiations and ongoing management roles, including relationship management, metrics, escalation and disengagement considerations. It also covers key components of crowd sourcing.

### **Chapter 8 Performance Management, Metrics, Management Controls, COBIT®, Risk Management, Business Continuity and Enabling Technology Excellence**

Covers the principles and practices of achieving IT performance excellence using balanced scorecard metrics and linking critical success factors to historic and predictive key performance indicators (KPIs). It reviews COBIT. It also covers risk management, assessment and mitigation strategies, and business and IT continuity planning and disaster recovery. Finally, it describes a suite of technology tools that support and enable the key IT alignment, execution and governance functions and processes.

**Chapter 9 Cloud Computing, Data Management and Governance Issues, Opportunities, Considerations and Strategies**

Cloud computing usually involves a large number of computers connected through a real-time communication network such as the Internet. The phrase is often used in reference to network-based services which appear to be provided by real server hardware, simulated by software running on one or more real machines. Cloud computing is a form of outsourcing with its own issues, opportunities, risks and metrics. Big data, analytics, business intelligence and decision support system are components of data management and require the use of databases, statistics and software tools and analytical skills to extract information to help make decisions to reduce costs, improve quality, reduce risks and assist in focusing on the most valuable customers. The data management and governance issues and strategies are addressed in this chapter.

**Chapter 10 Summary, Lessons Learned, Critical Success Factors and Future Challenges**

Summarizes the components required to anticipate and proactively implement IT governance and management effectively. It provides a summary checklist of all of the key components and critical success factors identified in each chapter to make IT governance real, effective and sustainable.

# Acknowledgements

I gratefully acknowledge the help and support of a number of individuals, organizations and their members in the private, public and academic sectors in conducting the research, editing the book, participating in developing the case studies, allowing me to consult and/or teach for them and influencing, reinforcing and validating the findings, recommendations, critical success factors and lessons learned.

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Dr. Gad J. Selig, PMP, COP  
Fairfield, CT

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## Appendix C References - Topic List

### A. Strategic Planning, Business/IT Alignment and Portfolio Investment Management

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# Appendix D Managing Accelerating Change and Transformation Framework

## ***Critical Success Enablers for Managing Change, Accelerating Change and Cultural Transformation***

**Change Acceleration Framework** – overall prerequisites for effecting accelerating change and transformation.

- People, Organization Architecture and Leadership
- Scalable and Flexible Processes
- Enabling Technology

Most organizations grossly underestimate the amount of, and strength of, resistance to change – it comes in many forms: overt, covert, conscious and unconscious.

- **Creating a shared need** – the reason for change is instilled within the organization – widely understood, motivational, pragmatic, achievable and embraced. The felt need (and benefits of the change) for the change must exceed the (natural) resistances.
- **Shaping a vision** – the desired outcomes of the change are clear, widely understood and shared. Individuals can envision the impacts and opportunities of the change for themselves (demonstrate and sell the benefits of the vision as it evolves and materializes, linking goals, objectives and strategies to vision).
- **Mobilizing commitment** – there is a strong commitment for the change from key constituents. They are committed to make it happen, make it work and invest their attention and energy.
- **Making change last** – change is reinforced, supported and refreshed so that it endures and flourishes throughout the organization.
- **Monitoring progress and learning** - progress is real (needs a baseline). Measurement systems are established, benchmarks are set and realized. **Learnings** are shared throughout the organization. **Current and evolving best practices** (both internal and external) are used as a basis for continuous improvement.
- **Changing systems, structures, capabilities and attitudes** – develop policies, practices and processes which facilitate, support and sustain change.

### **People/Organization Architecture & Leadership**

- Obtain **executive sponsorship** and champion(s) – need “leadership” at the highest levels
- **Get the right people** involved at the right time (phases):
  - Know the skills and competencies of your people
  - Develop and maintain a current database
  - Define roles and responsibilities
  - Co-location
- **Create peer pressure** that forces behavior change based on:
  - Value propositions
  - Speed

- Acceptable attitude about taking prudent risks and making mistakes (learn from them)
- Balance risk with appropriate rewards
- Define optimum individual performance objectives and measure progress:
  - Energy – how much energy you demonstrate on your job?
  - Energize – how effective are you in influencing others?
  - Edge – do you know and take advantage of your core competencies?
  - Execution – how effectively do you implement?
  - Ethics – honesty and integrity
  - Excellence – “be all that you can be”
- Set **bold cycle time** reduction objectives:
  - Establish current state baseline
  - Establish desired state baseline
  - Define transitional approach
  - Time-sensitive performance metrics and vital signs
- Embrace **speed and excellence**
  - Establish “speed” incentives and rewards (balance with quality, risk and customer involvement)
  - Incentivize employees to challenge the norms (**think and do out-of-the box; dare to be different**)
  - Recognize people and teams for a superior job
  - Continuous reinforcement of a job well done
  - Make decisions locally and in real time
- Create “**speed**” teams
  - Fast teams have strong leaders (well trained)
  - Keep team focused
  - Knock obstacles out of the way or neutralize them
  - Best-in-class talent
  - Establish ultra-clear priorities, roles and responsibilities
  - Reduce/eliminate job fragmentation (**do what you do best – do not sub-optimize**)
  - Fast electronic communications (24/7) – cell, teleconferencing, videoconferencing
  - Make fast adjustments
  - Leapfrog and compete on speed
  - Act within the spirit of the process (not strictly by the process)
  - Rotate “high potential team members” (at end of project) as change agents (to other initiatives) and incentivize them
  - Leverage the same project manager across similar type projects
- Conduct **fast team meetings**:
  - Do your homework
  - Don’t mind your manners
  - Stand up meetings make meetings short (no coffee or doughnuts) - Focus fast and keep focused
  - Encourage fast follow-up
  - Make fast work out of peripheral issues

- Bump up, not down (for meeting attendees)
- Turn off cell phones
- No side conversation – listen when someone else is talking
- **Create flatter, smaller and nimbler organizations based on effective teams:**
  - Increase span of control – virtual organization with access to **global brains**
  - Change fast
  - Multifunctional and team-based
  - Work on **building effective teams** – Forming, Storming, Norming and Performing
  - Real-time communication amongst team members
- **70/30% Decision Process** – it is an attitude about how sure you have to be to make a decision that provides permission to speed things up by not working harder, but smarter:
  - Complete consensus not required
  - **Time box scope and deliverables**
  - Use your judgment and previous experience – **odds are you are right**
  - Set time constraints on decisions
  - Make decisions and then move on - no rehash
  - Mistakes are acceptable – **but fix them fast**
  - Frequent customer validations
  - Take informed risks – **no pain, no gain**
  - Encourage continuous improvement
  - Learn how much you need to engage others to be 70% certain of your decision
  - Learn how much information is required to be 70% certain of your decision
  - Champion the 70% solution
  - Less stress
  - Encourage all to support and commit – it's an attitude that affects behavior change

A good decision today is better than a perfect decision tomorrow
--

- Create and sustain a **continuous learning** environment:
  - Know the skills-sets of employees (**skills database**)
  - Establish minimum competencies for various positions
  - Know the gaps
  - Encourage personal development, education and training programs and subsidize
  - Invest in continuous education and training (set minimum requirements per Employee per year)
  - Design training and education offerings to fit “speed” criteria (e.g. webcasts, video conferencing, three hour focused modules, etc.)
  - Encourage regular (senior to junior) and reverse (junior to senior) mentoring programs
  - Establish knowledge management processes to capture and access lessons learned
- **Best practice benchmarking:**
  - Form peer (external) group to share best practices
  - Continuously monitor, improve and adopt
  - Ensure that the organization develops as a learning system

### **Scalable and Flexible Processes**

- Develop **scalable, flexible and tailored business, project and innovation processes (e.g. ideation process)**
- Define **Mandatory (minimum) and Discretionary** phases, components, templates, procedures, etc.
  - Accommodate **multiple program/project/process types** (e.g. new, enhancements, operational software, infrastructure, product, etc.) & **complexity - size/value/reach/integration/funding/etc.**
  - Accommodate **outsourcing, in-sourcing and hybrid models**
  - Accommodate **fast track and full risk mitigation initiatives**
- Define business process models (how the business should operate), streamline and then automate
- Establish and enforce a well defined **governance process** with simple clear metrics, reporting guidelines and escalation processes:
  - **Clear roles and responsibilities**
  - **Issues management**
  - **Change management**
  - Employ **multiple communications techniques and frequencies** (especially prior to due dates for deliverables, milestones, meetings, etc. - 60 days, 30 days, 15 days, 7 days, 2 days, 1 day reminder notices)
  - Use **meaningful dashboards, metrics and graphs** (color coded) to convey successes and show laggards
  - **Escalate sooner** than later
- Institute a **Portfolio Investment Management process** –formalize the selection, evaluation prioritization and funding of initiatives based on business criteria:
  - Reprioritize active projects on an on-going basis
  - Do not classify each project as a priority
- **Time Box Scope:**
  - Smallest and clearest scope possible
  - Decompose large initiatives into programs and/or interrelated projects with time boxing
  - Chunk scope into time slots (no individual initiative exceeds three months, but interrelated projects can be longer as a group)
- **Time Box Deliverables:**
  - Short term incremental deliverables (80 hour rule)
  - Frequent iterations with constituencies, customer(s), team, etc.
  - Acceptance criteria
- **Outsource** (non-core initiatives or tasks, domestically or internationally) with a limited number of qualified (and certified) vendors:
  - Have a vendor selection and RFP process in place
  - Have a vendor management, escalation and metrics process in place
- Create **knowledge management cafes and repositories (capture intellectual capital for reuse):**
  - Lessons learned, best of breed processes, training for junior and senior folks
  - Leverage process experience to create templates, etc. for reuse

### **Enabling Technology**

- Streamline the workflow before automation
- Encourage collaborative tools (share documents, central repository for projects, groupware, etc.)

- Automate, automate, automate – web and sub-webs, tools, templates, PM software, lessons learned repository, knowledge management
- Easy to use, easy to locate
- Use expert systems and knowledge management to capture and re-use best practices and change poor practices
- Fast electronic communications (24/7)



## About the Author



Dr. Selig is the Associate Dean for Business Development and Director of the Technology Management Graduate Degree Programs in the Graduate Studies and Research Division and the School of Engineering at the University of Bridgeport. He also manages the CTech IncUBator at UB in partnership with Connecticut Innovations. He earned degrees from City, Columbia, and Pace Universities in Economics, Engineering, and Business. He has authored five books and over 70 articles, chapters in books, conference proceedings and presentations. He is a dynamic and popular in demand speaker at industry conferences and corporate events in the U.S. and abroad.

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