CIO First 90 Days

The First 90 Days for New Chief Information Officers and Chief Technology Officers.
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Introduction

A quick background on who this guy Benjamin Lichtenwalner (Lichten-wäl-nur) is and why he is interested in the first days for CIOs...

Education
Penn State University  BS Management Science & Information Systems
Lehigh University  MBA Concentrated in Corporate Entrepreneurship

Experience
Fortune 500 (E-Business Division Start-up); Inc. 500 (ERP Supporting Highest Growth Phase); NPO (Scaled Technology for 50% Growth 12 months).

Positions Held
Support Analyst, Software Developer Roles, Technical Lead (Software design / architecture), Project Manager Roles, Vice President of Technology (CIO responsibilities).

Why First 90?
- Seen it done right, seen it done wrong
- Did it right myself, did it wrong myself
- Lots of great books (recommended), but often not read
- Been through the pain, trying to spare others
Introduction: Background

- **Why the first 90 Days?**
  - Organization is waiting for your impact
  - Change is often needed quickly
  - Prioritization is critical
  - So much to do...

- **Will it vary by organization?**
  - Absolutely
  - Just one example here

- **Risks of unstructured plan?**
  - Poor prioritization
  - Miscommunication
  - Lack of organizational confidence
  - Wasted Resources
  - Ineffective lieutenants
  - Unhappy technology staff
  - Bottom line performance
  - Your job
  - ...

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Introduction: Overview

For simplicity and recollection, a framework of People, Products and Processes are addressed over 3 stages of 90 days.

Three P’s

- **People:** For each stage, the people you speak with and what you focus on in those conversations should vary.
- **Products:** For the purposes of this brief presentation, products refer to anything that may be considered a deliverable of your IT department: applications, infrastructure, policies, support and so on. Yes, it is a big category.
- **Processes:** You wouldn’t be where you are today without realizing the importance of process. However, there are different degrees of attention that you should pay to process in your first 90 days.

90 Days

- **First 30:** Emphasizes high-level conversations and getting to know the new organization or role.
- **Middle 30:** Digging into details.
- **Last 30:** Established what needs to be done, began the communication and building relationships.
“The Three Ps”
People, Products & Processes
Three P’s: People

- **Levels of Organization**
  Most organizations large enough to support a CIO/CTO have at least 3 categories of staff: Executives, Lieutenants and Individual Contributors
  - Executives
    - CEO
    - CxOs
    - Vice Presidents (SVPs)
  - Lieutenants
    - Directors
    - Managers
    - Line of Business (LOB) Leaders
  - Individual Contributors

- **Technology Staff**
  - At least top 2 across
  - As many as possible, according to size

- **Other People**
  - Vendors / Partners
  - Consultants / Contractors
  - Competitors / Similar Organizations
  - Regulators

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Three P’s: Products

At the highest level, the key areas of Products to focus on include Infrastructure, Applications and Services

- **Infrastructure**
  - Workstations
  - Servers
  - Telecommunications

- **Applications**
  - Desktop
  - Communication (Email, Chat, CRM, Telephony...)
  - Back Office (Accounting, Finance, Inventory, HR...)
  - Data Stores (DBs, Intranet, Knowledge Management...)
  - LOB Solutions (Engineering, Sales, Content Delivery...)

- **Services**
  - Project Management
  - Application Delivery
  - Support / Maintenance
  - Outsourcing
  - Policies
Three P’s: Processes

There are many processes to understand in your first 90 days. Many may be just unstructured communications – but they are still processes to understand. Key here is knowing who to contact, when and how, both within IT and across the organization.

- **Budget**
  - Tracking / Forecasting
  - Purchase Orders / Expense
- **Project Intake (IT)**
- **Prioritization**
- **Change Management**
- **Strategic Planning (and CIO’s Role)**
- **Support**
- **Accountability**
  - Budget
  - IT Organization (Scorecards)
  - Performance Management

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Timeline

First 30, Middle 30 and Last 30 Days
The first 30 days emphasizes high level conversations and getting to know the new organization and/or role. Therefore, the new CIO should focus on meeting with executives and technology staff, while understanding the most critical products and immediately necessary processes.

**Major Themes:**
- Research individuals
- Carefully prepare questions
- Be a sponge: listen, listen, listen and absorb
- Document and structure feedback

By the end of the first 30 days, you should start to have a feel for the organization. There should also be a sense of where the major pain points are and an idea of where you will begin to focus your energies in the first year.
Timeline: First 30 Days - People

- **Executives**
  - Most senior executives (CxO, SVPs)
  - What has worked well and what has not?
  - What are the most urgent IT needs?
  - What are the cyclical needs?

- **Technology Staff**
  - Gather existing performance reviews & resumes
  - At least top 2 across (as many as possible)
  - Similar questions
  - Which relationships are strong / weak (internal or external)
  - Understand responsibilities of each
  - Individual / Role / Task alignment exercise
  - Identify key responsibilities by individual / team
    - Security
    - Backups
    - Support
    - Telecommunications
Timeline: First 30 Days - Products

- **Infrastructure**
  - Network & Telecommunications
    - Network overview
    - Phone systems setup
  - Servers & Hosting
    - Number, types and ages of servers aligned by service
    - Hosting / Co-Lo / SaaS providers overview
  - Workstation Environment
    - Numbers, models, ages
  - Mobile Solutions (PDAs, EVDO)

- **Applications**
  - Desktop services
  - Communication
  - Line of Business solutions
  - Data Map overview

- **Services**
  - Overview of all
  - Focus: Support / Maintenance
  - Focus: Project Management
Timeline: First 30 Days - Processes

- **Budget**
  - Overview
  - Snapshot (Product too)

- **Project Intake (IT)**
  - New requests (Forms, approval)

- **Strategic Planning**
  - Technology Process

- **Support**
  - Service Level Agreements (SLAs)
  - Request Methods (Hotline, email, chat, after hours)

- **Accountability**
  - Budget Planning
  - SLA Tracking
  - Scorecard Tracking
The middle 30 days emphasizes continued conversations with organization leaders and getting to know more of the Technology team. There is an increased emphasis on the products at this point – learning what exists and why.

**Major Themes:**
- Meeting as many people as possible
- Study the products in detail
- Document and structure feedback

By the end of the middle 30 days, you should have a good idea for the state of the union at a high level. There will continue to be a number of surprises, but the first year action plan should be coming together. By the end of this period, you will want to feel confident in your grasp of the organizational priorities as you will begin to validate your planning with the organization in the final 30 days.
Timeline: Middle 30 Days - People

- **Business Lieutenants**
  - Directors, Managers
  - Same questions as executives

- **Technology Staff**
  - Any remaining, as possible
  - Same questions, where applicable

- **Smaller Consultants / Contractors**
  - Insights, feedback, plans
Timeline: Middle 30 Days - Products

- **Infrastructure**
  - Network & Telecommunications
    - Network specifics (vendors, WAN acceleration, traffic prioritization)
    - Security specifics (perimeter, passwords, intrusion detection, last test)
  - Servers & Hosting
    - Aging servers retirement plans
    - Capacity evaluation
  - Workstation Environment
    - Capacity evaluation

- **Applications**
  - Line of Business solutions (details)
  - Data Map (details)
  - Back Office Suite Overview

- **Services**
  - Details of all
  - Focus: Application Delivery
  - Focus: Outsourcing

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Timeline: Middle 30 Days - Processes

- **Budget**
  - Tracking
  - Purchase Orders / Expense

- **Project Intake (IT)**
  - Prioritization

- **Support**
  - SLAs – Internal

- **Accountability (Who, What, Where, When, Why, How)**
  - Budget
  - IT Organization (Scorecards)
  - Performance Management
Timeline: Last 30 Days

In the last 30 days you begin to establish recurring conversations as you leverage the knowledge you’ve gathered to begin planning. At this point you may also want to start reaching out to larger vendors and other external contacts, such as expanding your network.

Major Themes:
- Recurring meetings
- Expanding network
- Validating plans with leadership

By the end of the 90 days, you should have a solid understanding of the first year action plan. You will want to validate these plans with leadership across the organization and once validate begin execution. As you do so, you’ll want to start contacting larger external partners and begin thinking about your longer-term strategic plans.
Timeline: Last 30 Days - People

- **Executives**
  - Establish recurring update / meeting schedule

- **Technology Staff**
  - Establish recurring update / meeting schedule
  - Initial meetings with all remaining, as possible
  - Same questions, where applicable

- **Major Vendors / Partners**
  - Leverage knowledge from previous conversations
  - What has gone well, what has not
  - Thoughts on pricing, contracts, future needs

- **CIOs of Similar Organizations**
  - Depending upon competitive landscape

- **Regulators**
  - Leverage knowledge from previous conversations
  - Listen carefully
Timeline: Last 30 Days - Products

- **Infrastructure**
  - Network & Telecommunications
    - Telecommunication contracts review
  - Servers & Hosting
    - Hosting / Co-Lo / SaaS providers – contracts, performance tracking
    - Capacity forecasting
  - Workstation Environment
    - Capacity forecasting

- **Applications**
  - Standards (languages, vendors, disk capacity)
  - Back Office Suite Details (Integration, capacity, forecasting)
  - License audit / tracking

- **Services**
  - Details of any remaining
  - Capacity forecasts
  - Policies
Timeline: Last 30 Days - Processes

- **Budget**
  - Gap Analysis

- **Project Intake (IT)**
  - Pending Projects

- **Strategic Planning (and CIO’s Role)**
  - Business

- **Change Management**

- **Support**
  - SLAs – External Tracking
  - Vendors

- **ITIL / Best Practices Compliance**
Timeline: Summary

People
- Chief Officers
- Senior Vice Presidents
- Technology Leadership
- Key Technology Personnel

Products
- Network & Telecom Overview
- Security Overview
- Mission Critical Servers
- Line of Business Apps Overview
- Overall Data Map
- Desktop Services
- Support & Maintenance
- Project Management

Processes
- Budget Overview
- Project Intake
- Technology Strategic Planning
- Service Level Agreements

People
- Business Lieutenants (Dir. Mgr.)
- Remaining Technology Staff
- Small Consultants / Contractors

Products
- End of Life Servers
- Workstation Rotation
- LOB Application Specifics
- Back Office Applications
- Outsourcing

Processes
- Budget Tracking
- P.O. / Expense
- Application Delivery
- Internal SLA Tracking
- Performance Management
- IT Scorecards

People
- CxOs (Recurring)
- Remaining Technology Staff
- Technology Staff (Recurring)
- Major Vendors
- CIO Networking
- Regulators

Products
- Telecom Contracts
- Infrastructure Capacity Forecast
- Application Standards
- License Auditing
- Policies

Processes
- Budget Gap Analysis
- Pending Project Aprovals
- Business Strategic Planning
- Change Management
- ITIL / Best Practices

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Timeline: Effort Allocations

- **First 30**
  - People – Heavy
  - Products – Light
  - Processes – Light

- **Middle 30**
  - People – Light
  - Products – Heavy
  - Processes – Light

- **Last 30**
  - People – Light
  - Products – Light
  - Processes – Heavy

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Timeline: After the 90 Days

- Clear Prioritizations
- Develop Year 1 Action Plan
- Validate Priorities with Business
- Communicate Priorities to IT
- Build Consensus Across IT
- Communicate to Business
- Begin Longer-term Strategic Planning
Resources for CIOs

- NY CTO Club (Free)
- NPO CIO Council (Free)
- Other IT Networking Clubs
- Technology Executive Networking Group ($)
- Society of Information Management ($)
- Association of Information Technology Professionals ($)
- CIO Executive Roundtable (CIO Mag.) ($$)
- Gartner ($$$)
- Forrester ($$$)
A few more thoughts

- Many “Ah-ha” and “Gotcha” moments will follow for a long time. Key is getting started on the right foot with a solid understanding across all major areas.
- Never eat lunch alone* and never forget to schedule your lunch meetings.
- Everything will be interpreted (sometimes too much), be sure you prioritize these steps and communicate in manner you want to relay. For example, are you a top-down leader, bottom-up, or do you develop teams that lead by consensus?
- Inform IT staff of some guideline to your plan, for example:
  - Over the next 8 weeks:
    - Series of meetings on IT Services
    - First 4 weeks, getting a grasp of basics
    - Next 4 weeks, digging into details
- Ask yourself: Who is your team – executive leadership technology staff?
- What is the culture of the organization?
  - Entrepreneurial?
  - Bureaucratic?
- After you have customized this example or another to your specific organization, know that it will all seem to go out the window the day you start. But remember, “plan your work and work your plan”. Come back to your plan often, regardless of how many obstacles arise.
THANK YOU and GOOD LUCK!