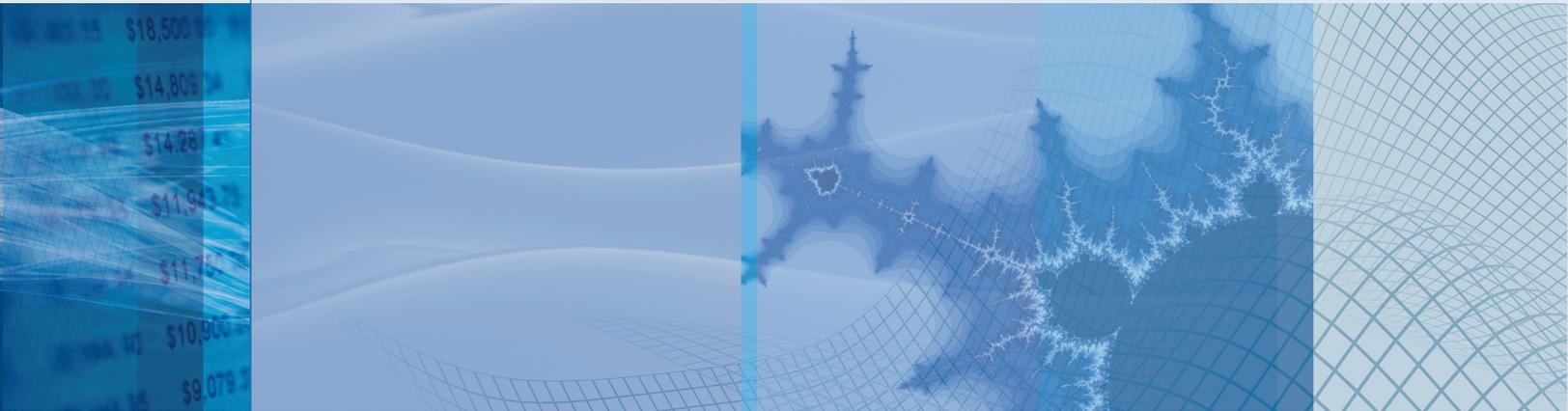




GARTNER EXP CIO TOOLKIT:
THE FIRST 100 DAYS

Executive Summary



Gartner EXP is an exclusive, membership-based organization of more than 3,000 CIOs and senior IT leaders worldwide. Members benefit from the convenience of a single source of knowledge and insight focused on CIO-level challenges, dedicated and personalized service, the shared knowledge of the world's largest community of CIOs and the assurance of Gartner objectivity and insight.

The first 100 days constitute an expected “honeymoon”, or transition period in business and government. The president of the United States gets 100 days; so do you. This toolkit provides many tools, checklists, scorecards and illustrations to help you to develop a 100-day plan.

The tools in this workbook are divided into modules (or sections) that examine how to prepare, assess, plan, act, measure and communicate during this transition period. At the highest level, the first 100 days can be divided into the following general segments:

- **Minus Day 10**—The interview period, a theoretic time of reflection: spotting the problem indicators and deciding what to do about them.
- **Day 0**—The day you start; when you officially hit the restart button.
- **15-day chunks**—Approximate two-week periods when activities begin to overlap. Some assessment is taking place while planning begins; actions occur while others are still being planned; measurements begin for early actions while other actions are still being taken that may provide only cursory data by 100 days’ end.
- **Throughout**—Communication is critical! Some CIOs in change situations report that they spend between 50% and 80% of their time communicating what IT is going through, and why. Communication must occur throughout the entire 100-day period.

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This document contains excerpts from the full 120-page toolkit that is available to Gartner EXP members. The complete table of contents is included below to illustrate content available in the full toolkit.

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Does the IT Application Portfolio Meet
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THE GARTNER EXP CIO TOOLKIT: THE FIRST 100 DAYS

The first 30 days involve getting a clear picture before setting business expectations. The next 70 days involve intensive planning, taking actions and measuring results.

New CIOs formulate an assessment by:

- Building an inventory of current IT projects and business requests. Quantify the demands for IT services and qualify the gaps between what IT is doing vs. what the business expects from IT.
- Getting to know key personnel in the IS organization. Understand their roles, current performance and future potential.
- Clarifying IT technical and service-level performance, to separate the perception of what is going on from the reality of what is actually taking place. Consolidating IT budgets and costs to gain a full picture of what support resources are available for IT change, and where those resources are currently being deployed.

This information builds a total view of the current situation so you can start formulating a short-term tactical plan: the 100-day plan.

In some situations, current IT performance is increasing the potential for major IS changes. If this is the case, then CIOs must reset their view in light of changing business expectations, the business' perception of IT performance or actual IT performance. Taking a step back and gathering this information can bring a fresh perspective to the current situation, and an awareness of how to move forward.

TAKING A STEP BACK: USING THIS TOOLKIT

What does it mean to “take a step back”? If you’re being recruited, you must do your own due diligence on the company recruiting you. You’ll need to know what you’re getting into.

The Prepare and Assess sections are meant to help you identify the pressing areas in need of fixing. Using the tools within these sections to focus your Plan and Act phases will provide measurable improvements.

Review the IS Performance Assessment questions available in the full version of this report. If you’re interviewing for a CIO position—either internally or externally—you’ll find the “Top 15 CIO Interview Questions” available in the full version of this report helpful in preparing for an interview.

Remember that executive recruiting is a two-way interview process. You will want to make sure the fit is right from your perspective, just as the hiring company is looking for a good fit from their perspective. If there are some red flags raised in answering these first-step questions, you will want to focus on the tools in the Prepare section, as they provide more insight into what may be going on.

These tools provide you with a way to evaluate any type of prospective situation, all the way up to one with potential for a full-blown IS turnaround. Whether you are new to a company as a CIO or you have been promoted internally (in essence, rehired by your company), this toolkit will help you launch a 100-day plan that restarts your IT organization, and focuses it on addressing the reasons you were hired.

At one extreme, you may want to use these tools to totally reorganize the IT department. At the other, you may want to use this toolkit to create a new energy in the IS organization, and to focus on increasing business contribution and operational performance. Whatever your goal, it is not our expectation that you will be able to boil the ocean and solve all of IT’s performance (and perception) problems in the first 100 days of your job.

A QUANTUM LEAP IN PERFORMANCE

We say that a quantum leap in performance is an ideal outcome, but what does that mean? If you've been hired, the enterprise—the business—expects that they hired the right person. At the end of the first 100 days, you will have taken focused, measured steps to prove them right (with quantifiable key metrics). Remember that communicating this fact throughout the entire period is also a crucial part of the plan.

INTRODUCTION

WHO SHOULD USE THE GARTNER EXP CIO TOOLKIT?

A CIO who is new to the role.
A CIO who is new to a company.
Someone who is about to become a CIO, or who is being recruited for a CIO role.

BOTTOM-LINE EXPECTED OUTCOME: A QUANTUM LEAP IN PERFORMANCE.

Figure 1: Who Should Use The Gartner EXP CIO Toolkit?

PREPARE, ASSESS, PLAN, ACT, MEASURE/COMMUNICATE

Each activity in this toolkit has its own purpose, meant to bring an increasing focus to bear on critical issues. For example, the assessments will lead to planning activities with a more narrow focus. Planning activities will bring further focus to bear on actions to be taken. The qualifiable and quantifiable outcomes of actions will then yield concise and measurable gains.

No 100-day plan would be complete or effective without strategic communications. Each 15-day period contains recommendations as to what you should be communicating, how and to whom. The communication map, available in the full version of this report, provides a particularly detailed set of questions to help you remain focused on communication.

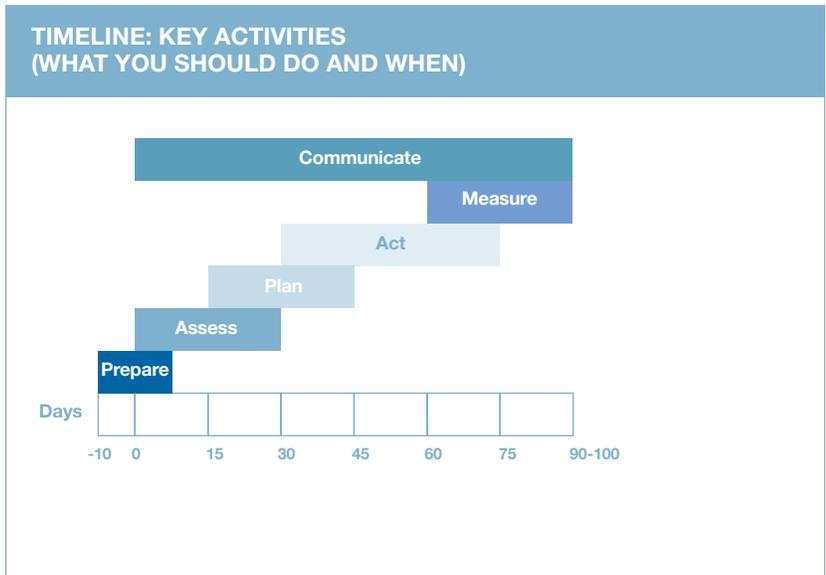


Figure 3: Timeline of Key Activities

PREPARE

Other topics discussed in this section of the full 120-page toolkit that is available to Gartner EXP members include:

Perception vs. Reality

Top 15 CIO Interview Questions

10 Questions the CEO Should Ask the CIO

Sample CIO Job Description

Exercise: Write Your Job Description

The CIO Reporting Matrix

Who will you report to and why?

What Is Your CIO Agenda?

Working “In” vs. “On” the Business

CIO Leadership Assessment

“Can I Actually Accomplish This Job?”

Cover Your Bases

What you need to know—what are your non-negotiables?

Exercise: Record Your Answers to This Module’s Key Questions

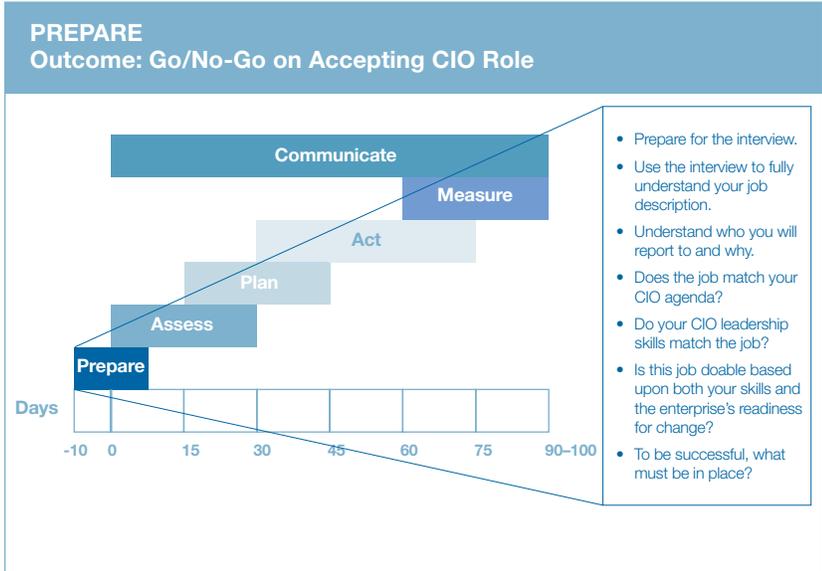


Figure: Prepare Activities Sequence

PERCEPTION VS. REALITY

In most situations, what people believe is going on often differs from what is really going on—what is actually taking place. It is imperative that you find out if the existing perception of the IS organization is indeed reality.

Without exception, your new peers will expect flawless delivery of IT services. Beyond that, they also will want to see that you actually are contributing to the business. To help you determine peer perception, answer the following questions:

- Is there a problem with IT today?
- Is IT in need of a massive turnaround?
- If so, then why am I being hired?
- Why will I succeed where my predecessor failed?
- Can I do this?
- Do I have a clear and realistic understanding of my job description?
- Am I the right person for this job?
- Is this job even doable?
- How do I cover my bases?

ASSESS

Other topics discussed in this section of the full 120-page toolkit that is available to Gartner EXP members include:

The Four Dimensions of the Balanced Scorecard Model

“How Do I Find Out What Is Really Going on Here?”

IS Performance Assessment

IT Strategy Health Check

IT Spending Data Check

IT Data Spending Check by Industry

Sourcing Performance Assessment

The 20 Key Competencies of Emotional Intelligence

Interview your IT Staff Through the “Lens” of Emotional Intelligence

Determine the IS Structural Organization Model

Does the IT Application Portfolio Meet Business Needs?

Know Your Four IT Infrastructure Views

Creating a Power Map: An “Influence Plan”

Exercise: Diagram Your Own Power Map

Assess the Current IS Scorecard

Using a Compliance Checklist

Exercise: Record Your Answers to This Module’s Key Questions

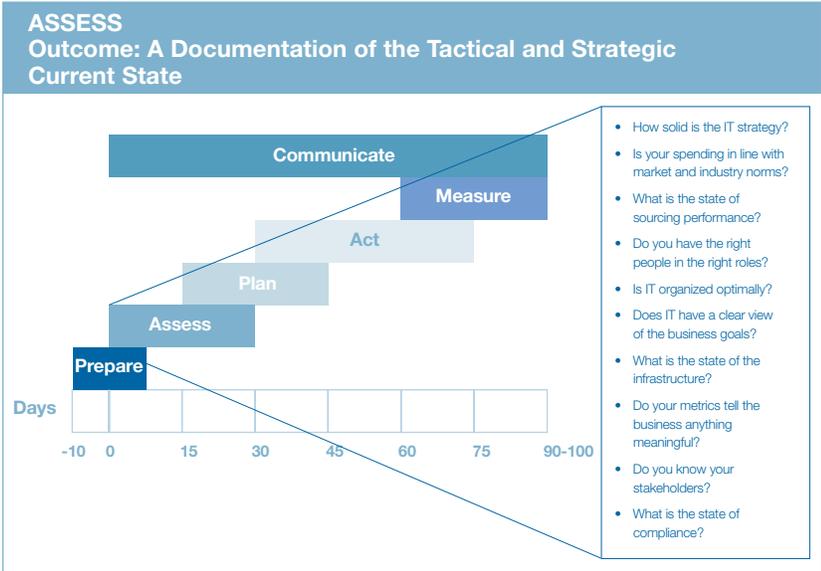


Figure: Assess Activities Sequence

THE FOUR DIMENSIONS OF THE BALANCED SCORECARD MODEL

Many of the assessment tools in this toolkit are divided into four key dimensions, which we will call “focus areas.” These four dimensions generate particular questions specific to their location within the overall plan. The four focus areas (dimensions) are as follows:

- People
- Customers
- Service
- Finance

These four dimensions are the same as those found in the Turnaround Assessment Scorecard, and the four dimensions of a balanced scorecard. Most CIOs are familiar with the balanced scorecard model, as it is widely used in enterprise situations, so there is no need to reinvent the scorecard metaphor.

Note: A “dimension” and a “focus area” are often the same thing for the purposes of this toolkit.

PLAN

Other topics discussed in this section of the full 120-page toolkit that is available to Gartner EXP members include:

“What Should I Focus on and How Do I Plan My Actions?”

Use the IT Governance Effectiveness Scorecard

In vs. on the Business

IS “Lite”

The IS Competency Spectrum

Building Business Priorities

Building Management Priorities

Setting Technology Priorities

Revisiting the Power Map

Exercise: Record Your Answers to This Module’s Key Questions

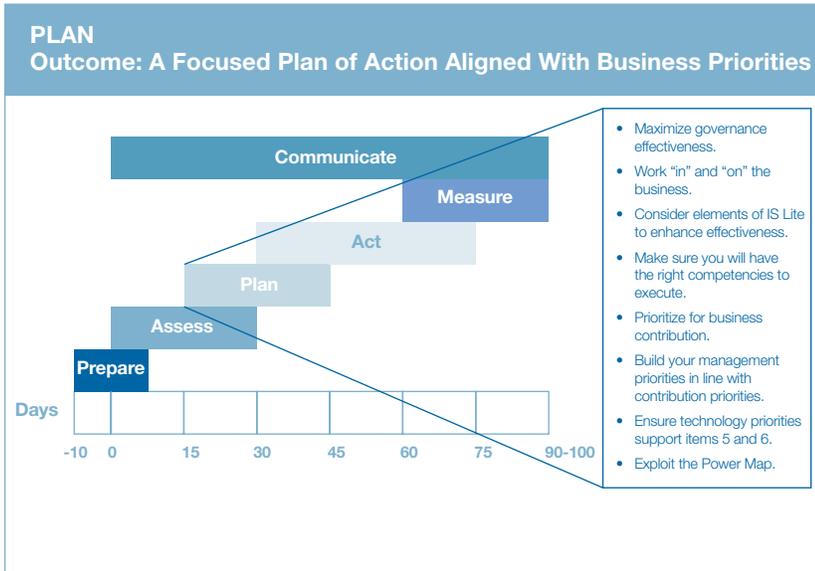


Figure: Plan Activities Sequence

“WHAT SHOULD I FOCUS ON AND HOW DO I PLAN MY ACTIONS?”

Around Day 15 (Day 45 at the latest), you must create a targeted plan of action. Since hopefully, you have indeed found that not everything in IT is broken, and you’ll be focusing your efforts on what is truly broken at the moment, you must answer the following focus-area questions.

People

- Who do I have to move around into new roles, and what roles must I create?
- Who has to go?
- How can IT be organized for maximum effectiveness?

Customers

- How am I going to engage my peers and other business leaders, and on what issues?

Service

- What can we do to stabilize and increase IT services’ performance?
- What is the best way to ensure that the application portfolio meets the business’ needs?

Finance

- How am I going to bring spending on both operations and new business services in line with my peer groups?
- How can spending be more in line with the business’ goals?
- What am I going to do about my vendors, and what are my current contractual commitments?

Your assessment phase should have revealed four issues to address immediately and two that may lag behind those. Use a subset of these tools to plan your actions.

ACT

Other topics discussed in this section of the full 120-page toolkit that is available to Gartner EXP members include:

“Based Upon My Planning, What Do I Do Next?”

Tactical Governance

Designing a Five-Step Compliance Plan

“Hire” and Develop a Team

Developing the Team

Adopt Elements of IS Lite

Audit the Application Portfolio: Systems Audit Analysis

Exercise: Develop Your Own Systems Audit Analysis

Build a Project Management Office (PMO)

Relationship Management

Build Business Process Capabilities

Fixing the IS Scorecard

Exercise: Record Your Answers to This Module’s Key Questions

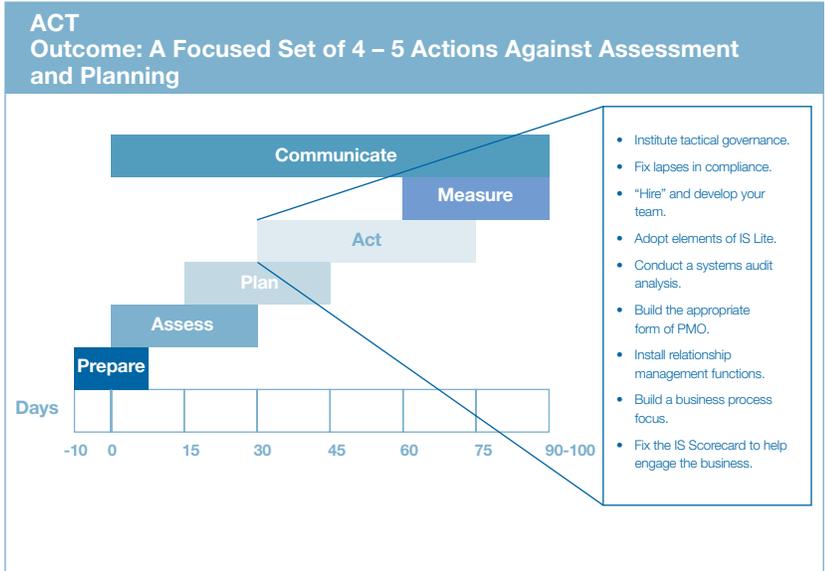


Figure: Act Activities Sequence

“BASED UPON MY PLANNING, WHAT DO I DO NEXT?”

At or around Day 30 (by Day 75 at the latest), you must take action. Focus your efforts on what will fix that which is truly broken. At this time, you must answer the focus-area questions below.

People

- What leadership actions will I take with my people?
- What actions will I take for IT to be organized for maximum effectiveness?

Customers

- What actions will I take with my peers and other business leaders, and on what issues?

Service

- What will I do to stabilize and/or increase IT services’ performance?
- What will I do about the application portfolio meeting the business’ needs?

Finance

- What actions will I take to bring spending on both operations and new business services in line with my peer groups?
- What actions will I take to bring spending more in line with the business’ goals?
- What actions am I going to take with my vendors and my current contract commitments?

MEASURE

Other topics discussed in this section of the full 120-page toolkit that is available to Gartner EXP members include:

Quantify Your Current Impact

IS Performance Gains

What Is Enterprise Agility?

Articulating Shareholder Value

How Are You Articulating Shareholder Value

Identifying Shareholder Value

Example: Identifying Shareholder Value

Dashboards Provide Business Context for IS Activities

Exercise: Record Your Answers to This Module's Key Questions

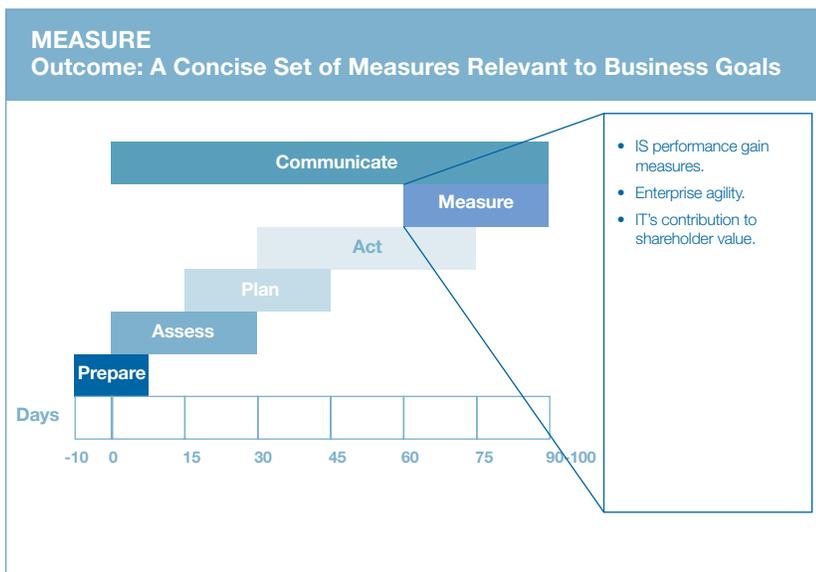


Figure: Measure Activities Sequence

QUANTIFY YOUR CURRENT IMPACT

At approximately Day 60 (Day 90 at the latest), you must qualify and quantify the impact you have had and expect to have. At this time, you must answer the following focus-area questions:

People

- Are my people more effective?
- Is my IT organization more effective?

Customers

- What impact have I had on my peers and other business leaders, and on what issues?

Service

- Have I stabilized and/or increased IT services' performance?
- Is my application portfolio meeting the business' needs?

Finance

- How am I bringing spending on both operations and new business services in line with my peer groups?
- How have I brought spending more in line with the business' goals?
- How have we benefited from actions taken with vendors and current contract commitments?

COMMUNICATE

Communication and documentation are critically important throughout the first 100 days. This module includes tools to help you communicate and document your personal contributions relative to: people, customers, service, finance, operations and the enterprise. Other topics discussed in this section of the full 120-page toolkit that is available to Gartner EXP members include:

“What Do I Say, and to Whom Do I Say It?”

The Communication Map

Documenting Your Results

“How am I doing?”

Operations: Key Metrics

Key Metrics for Building Strong Relationships

Key Metrics for Leadership of the IS Organization

Enterprise Contributions: Personal Scorecard

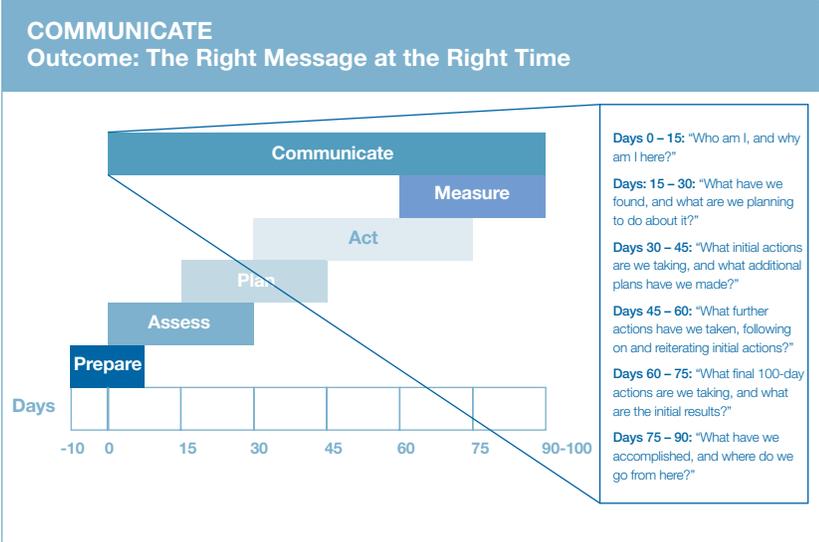


Figure: Communicate Activities Sequence

“WHAT DO I SAY AND TO WHOM DO I SAY IT?”

At the beginning of this toolkit, we saw that perception is 80% of the CIO’s battle (“Perception vs. Reality,” page 11). During this entire 100 days, you have a unique opportunity to communicate why IT will be different going forward. The sole outcome of this effort is for everyone in the enterprise to say, “We hired the right person for this job.” To do so, answer the following focus area questions:

People

- Are my people more effective?
- Is my IT organization more effective?

Customers

- What impact have I had on my peers and other business leaders, and on what issues?

Service

- Have I stabilized and/or increased IT services’ performance?
- Is my application portfolio meeting the business’ needs?

Finance

- How am I bringing spending on both operations and new business services in line with my peer groups?
- How have I brought spending more in line with the business’ goals?
- How have we benefited from actions taken with vendors and current contract commitments?

The information contained in this toolkit was designed to guide you step by step through your entire transition period in business or government as a CIO who is new to the role or transitioning into the position at a new organization. Gartner Executive Programs hopes that you found this excerpt helpful and that it has piqued your interest in the full version of this toolkit as well as membership in Gartner EXP.

This toolkit is focused on the first 100 days in your role. The Gartner EXP annual, member-driven CIO research agenda is geared toward providing you with ongoing insight and advice as you continue to implement the goals and programs that you outlined in your first 100 days. It reflects the priorities, beliefs, challenges and opportunities of thousands of global CIOs. It is by far the most complete study of CIO behaviors and beliefs, tapping into CIOs from around the world, representing every continent and industry. Over the course of the year, Gartner EXP publishes exclusive CIO-focused research reports, tools, templates and case studies based on the annual CIO research agenda that delve deeper into CIO priorities and issues.

Gartner EXP is an exclusive, membership-based organization of more than 3,000 CIOs and senior IT leaders worldwide. Members benefit from the convenience of a single source of knowledge and insight focused on CIO-level challenges, dedicated and personalized service, the shared knowledge of the world's largest community of CIOs and the assurance of Gartner objectivity and insight.

For more information on Gartner EXP, please visit gartner.com/exp or contact your Gartner Account Executive.

■ ■ ■ ■ **ABOUT GARTNER**

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