IT Management Models
by Mike Sisco

A new approach in discussing IT management concepts
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Introduction

They say, "a picture is worth a thousand words". I'm not exactly sure who "they" are, but I do know that pictures can help you teach others as well as make it easier to learn and remember new concepts.

I have always been a "visual" manager who uses images to help explain key points and to reinforce many of the strategies I promote. Many former employees and colleagues have commented that I have an ability to take complex concepts and depict them in simplistic images (models) that are easy to visualize and understand.

That's what this book is all about. For three years, I have been creating models and collecting ideas that will help IT managers and project managers of the world learn key concepts in managing the business of information technology. It is a project that I've had on the drawing table for a long time and has been great fun to develop, , , and a lot of work.

The approach used in this book is to present you with over seventy IT management models. Each model discusses a management topic that is important for success. Category groups are defined and appropriate models are included for each category. This allows you to review a collection of models or concepts that apply for a given category and will help you achieve more success in that management discipline.

Managing organizations at a high level is serious business, and having fun along the way is half the battle. I hope you find the material helpful in your quest and I welcome your feedback. You may contact me at mike@mde.net.

**IT Management Models** compliments the ten books initially written for my **IT Manager Development Series**. This book and all the others were written to provide a practical perspective from a senior management level and to give the reader "how to" instruction to help you **achieve more** success. To learn more about MDE's other IT management publications, log onto www.mde.net/cio .

MDE Enterprises also provides the most comprehensive IT manager education curriculum in the industry. For more information, go to www.mde.net/schedule for program topics and schedules.

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Best of success,

*Mike Sisco*
Dedication

This book is dedicated to my wife, Dorine. She has been like a rock and has long been my best friend. With close to 50 years of friendship and over 33 years of marriage, Dorine has been a tremendous support throughout my career. Without her help, I certainly would not have achieved the level of success I have been able to attain.

It's appropriate to dedicate this particular work to her because she is such an artist and creative person in her own right. Dorine even provided a bit of "artistic" insight to some of the models contained within. I'm constantly amazed at her creativity.

She truly makes every day a fun day to be alive, and I'm lucky to have her at my side as my wife, life partner, and best friend.

Dorine, I love you and appreciate you so much.

Mike
# IT Management Models

## Table of Contents

I. IT Management Models – a new concept from Mike Sisco 8  
   A. Purpose 8  
   B. Targeted Audience 9  
   C. A new model every week 10  
      1. Learning a new model 10  
      2. Incorporating it into your management style 10  
   D. Benefits 11  

II. Developing the models 13  

III. Components of a model 15  
   A. A picture is worth a thousand words 16  
   B. Description 17  
   C. Key points 17  
   D. Category 18  
   E. Discussion 20  

IV. Organization of the book 21  
   A. IT Management Models Category Groups 23  
      1. IT Assessment 23  
      2. IT Strategy and Planning 23  
      3. IT Project Management and Process 23  
      4. IT Organization & Staff 23  
      5. IT Financial Management 23  
      6. IT Measurements and Communication 23  
   B. The IT Management Models 24  
   C. Category Summaries 24  
   D. IT Management Models - Reference Index 25  

V. The IT Management Models - Categories 26  
   A. IT Assessment 28  
   B. IT Strategy and Planning 30  
   C. IT Project Management and Process 32  
   D. IT Organization & Staff 34  
   E. IT Financial Management 36  
   F. IT Measurements and Communication 38
VI. The IT Management Models

1. Scope creep
2. $2 + 2 = 5$
3. High road -- Low road
4. IT Project Priority Hierarchy
5. Career Paths
6. FTP or PTF
7. Expect the Unexpected
8. Prevent Fires
9. What Goes Up Must Come Down
10. Communication Circle
11. What Goes Around Comes Around
12. Open Door Policy
13. Change Management Processes
14. Key New Hire
15. Training plan
16. Murphy’s Law
17. Create Vision
18. Decision Making
19. Ready – Aim - Fire
20. Target your efforts
21. Pressure points
22. Strategy basics
23. Bite the head of a frog
24. Drain the swamp
25. Lines of fire
26. Snails crawl; birds fly
27. 2 birds with 1 stone
28. Bottlenecks
29. The main thing is not to get excited
30. Invest in yourself
31. Net it out
32. In sync
33. Management Basics (AQPPI)
34. Do the right thing
35. Win-Win
36. 5-lb sack
37. Change Facilitator
38. Play Your Position
39. Management Layers
40. Define Responsibility
VI. The IT Management Models (continued)
   41. Every Day is a New Day 122
   42. Be Selfish 124
   43. Set the Tone 126
   44. Listen 128
   45. Manage Expectations 130
   46. Follow-up 132
   47. IT Assessment Focus 134
   48. Think Out of the Box 136
   49. Problems are Opportunities 138
   50. Budget Buffers 140
   51. Cost Saving Strategies 142
   52. Uptime is King 144
   53. Disaster Recovery 146
   54. Backup 148
   55. Verify References 150
   56. Quality Assurance 152
   57. Project Management 154
   58. Help Desk 156
   59. Observe 158
   60. Experts and Depth 160
   61. I knew this was a snake when I picked it up 162
   62. Focus 164
   63. Escalation 166
   64. Stability 168
   65. Scalability 170
   66. Reward Desired Behavior 172
   67. 0 to 180 in 30 days 174
   68. Measurements 176
   69. Understand the Business 178
   70. Effective Meetings 180
   71. Performance Plans 182
   72. "Bubble" Effect 184

VII. IT Management Models Category Summaries 186

VIII. New Models Template 200

IX. IT Management Models Reference Index 203
I. IT Management Models - a new concept from Mike Sisco

IT Management Models is a concept I have wanted to develop for over three years. As far as I know, it is a unique approach in developing IT management skills.

The approach is a simple one. For each management concept, a model (or picture) is provided with key bullet points that emphasize important aspects of the management issue as it relates to managing technology resources.

Managing technology resources is one of the tougher management responsibilities in any company. There are many reasons for this:

1. Technology is changing at a rapid pace.
2. Information technology employees are a different breed of people with unique challenges and needs.
3. Company employees don't always understand or appreciate the technology they use and that you have to support.
4. Technology users have varied needs that change over time.
5. Other managers in the company do not always view IT as a "mainstream" organization of the company.
6. Very few "non-IT managers" are capable of helping an IT manager.

Introducing IT Management Models. This publication is like none other and has been designed with the intent of helping you learn, discuss, and remember key management principles that are important to be an effective IT Manager. It is also designed to be fun.

With that, let's begin.

A. Purpose

The purpose of writing IT Management Models is to carry on our company mission of providing practical insight and tools to help IT managers of the world achieve more success.

It's a simple objective: share practical insight from my twenty-plus years of management experience that has helped me in the real world of managing technology resources. Many of the things that were difficult learning processes for me can be much easier for those we reach.

If I had access to information like this when I was developing my management style and skills, much of the learning effort would have been a lot easier and probably would have had caused fewer injuries. That's the real objective: to streamline your learning curve by taking advantage of the tools and material I can develop to help you learn faster and to retain the information longer.
As mentioned earlier, you have one of the toughest management jobs in your company. Not only that, there aren't many resources available to help you learn what you need to know to be successful in a technology management role.

Senior management and the other department managers of your company typically do not have an appreciation for the issues you face as an IT manager. They have technology support needs but often can't articulate exactly what the need is. As a result, you often have to wear multiple hats and understand the other department's issues and needs more than they need to understand yours to be successful.

Seems a bit "one-sided" doesn't it?

Well, in fact it is, but that's the deal you have. If you want to be successful as an IT manager, you have to be able to understand what a department manager is telling you about his business issue and often decipher the "message" to get to the real issue.

**IT Management Models** will not help you translate business issues to appropriate technology actions. What it will do, is give you a sound foundation of fundamentals that will help you in your day to day management responsibility and provide a communication vehicle to discuss technology issues effectively.

In essence, this publication is about fundamentals of management. If you look at the great athletic coaches of the world, you will consistently find that they all focus heavily on the fundamentals of their particular sport. Execute the fundamentals well and you will succeed.

**IT Management Models** provides the fundamentals of the IT management world in short, concise lessons that are easy to learn and very easy to remember and discuss.

### B. Targeted Audience

The targeted audience for this document are the IT managers, CIO's, and hopeful IT managers of the world as well as project managers, and team leaders. Even technical employees can benefit from this publication. As of the writing of this publication, MDE has sold management publications to IT managers in over 70 countries and continues to develop new content.

Whether you are just starting out in your management career or have been a manager for many years, **IT Management Models** can be a valuable tool to help you in your challenging role.

If you're a senior manager, you may want to consider obtaining a copy of **Models** for others in your organization and company. Information is available at [http://www.mde.net/models](http://www.mde.net/models).
C. A new model every week

There are 72 models included in this publication. That means you can take a new model every week, and incorporate it into your management style. Approaching it in this way allows you to grow your management skill gradually. Working diligently on a new model every week will allow you to ingrain the model into your management skills inventory until it’s a natural part of your repertoire.

1. Learning a new model

   Coming up to speed on a new model is a straightforward process. Take a look at the model itself (the picture) and read through the bullet items to gain familiarity with the model.

   Read through the bullets a few times, while glancing at the picture as you become familiar with the key points identified for this particular model. The bullet points are intentionally "net" and to the point. To remember a new model, you will want these key points to be as direct and memorable as possible.

   After you are familiar with the key points, read through the discussion section. The discussion section will explain the model more thoroughly and may include examples or other key points that explain the model in more detail.

   As you read through the discussion section, relate to the picture of the model, as well as the key points that were highlighted for that model. Try to visualize the model as it relates to the key points in the discussion section.

   Once you are completed, you may want to jot down some notes that provide additional information that helps you in using the model. Examples of this might be:

   - additional key points
   - a personal example
   - additional thoughts

2. Incorporating it into your management style

   Print the model out and carry a copy with you. Refer to it often as you work through your daily tasks. Use it as you discuss the model with others.

   Review the model several times a day until it is something that becomes second nature to you. Once you have a model ingrained into your thought processes, it becomes part of your management style.
You will find some models more difficult than others to incorporate into your management style, and you may even find a few models that you are uncomfortable with. If so, do not include it as part of your management style.

Always remember, it is your management style and no one else’s. What is natural for one person may not be so natural or even appropriate for another. If a model doesn’t fit your personality, don’t use it.

**Personal note:** One of the best tips I received from my first IBM manager was to, "learn from the experienced Marketing Reps and SE’s of the office and incorporate the things that are good in each of them into your approach and style as you develop your skills".

This piece of advice has been instrumental in my approach for over 20 years and it has led me to where I am today. Take this advice to heart; it will help you become a stronger professional and enhance your career.

For the most part, you will find each of the models to be easily adaptable into your own personal management style.

### D. Benefits

There are many benefits in learning the models in this publication such as:

- helps establish a stronger management foundation
- will help you discuss management issues and topics with others easily
- will give you an additional insight in handling issues
- will help you remember key management principles
- will help you manage more proactively

You will see the benefits manifest by the improvement of your management understanding and the additional management insight that will be added to your management style. You'll also find that others around you will also benefit as you relate to these models in discussions, meetings, and other communication sessions you use in your day to day activities.

For example, over the years I have used many of these models often to focus in on a key point, to coach an employee or team of employees, or to highlight as an example when teaching others about what we're trying to accomplish.

We all relate to visual images. The models in this publication have been developed with images that are hopefully memorable and pertinent to the management concept being discussed.
The overall benefit of learning each of the management models is that it increases your management capability. The more you understand the dynamics of what it takes to be an effective IT manager and how to go about it, the more accomplished you will be and the more success you will achieve in your management role.

Learning how to manage effectively is an ongoing process. The more you learn, the more you discover how much there is to know, and how involved this discipline of management really is, especially when it comes to managing technology resources.

People can be different every day. Technology changes every day. User needs vary from day to day. What all of this says is that managing IT is a very dynamic business. In order to manage effectively in a dynamic business, you need experience and plenty of tools to deal with the changes that occur from day to day.

**IT Management Models** is one set of tools that will help you become an effective IT manager. I encourage you to use these tools and even to customize them so that they provide you the best benefit possible.

Another suggestion is that you may want to consider maintaining an IT management models notebook. To grow and become more proficient in any skill, you must dedicate time and effort to develop that skill. Management skill is no different. One way to develop your management skill is to maintain an IT management models notebook and add to the notebook every time you learn a new management concept or think of an appropriate management model that makes sense to you.

Your management repertoire should not be limited to what you learn in this publication, training classes, or other formal sessions you participate in. Your overall management style is made up of both these formal tools available to you as well as your personal experiences and what you decide to incorporate within your management skill set.
II. Developing the models

I began developing my IT management models at least 20 years ago. I have always used visual images to help me manage an IT organization. I use images to coach employees, to explain complex scenarios, to sell my points of view, and to make presentations. It makes it more fun and helps me get the message across.

One of the models I have used perhaps the longest is about "playing your position". Initially, I developed this model to emphasize to my IT staff the need to stay focused to their assigned responsibility. It's all right to help others, but not if it causes you to fail in handling your assigned responsibility. Good intentions by an individual can actually be devastating to the team.

Example of a model "picture"

I have drawn this model a thousand times to emphasize the need to "**focus**" on your assigned responsibilities. When I started using it, I wasn't thinking about it as a model; I was just trying to create an image that made sense for people so they would understand my message and "get the point". It has been an effective approach for many years.

In the late 1980's, I took a management class called Model-netics. In the class, they used models as a teaching example. I still remember many of the models because I incorporated them into my management style.

The combination of my inclination toward using images to help explain concepts and the Model-netics class I took many years ago caused me to think about the possibility of doing something similar targeted to IT managers, team leaders, project managers, and technical employees of the technical world.
When I started MDE Enterprises in late 2000, the mission was to create a training company to help IT managers improve their management skills. Early on, I knew that I wanted to develop this **IT Management Models** book and use this "models" to help teach others. Thirteen books and a dozen training classes later and here we are.

I began thinking about models and how they might apply to managing technology resources. It's very common for me to make notes about new project initiatives I want to start or things I need to do so I started an IT Management Models notebook like I mentioned earlier. In the notebook, I started listing the IT management models that made sense to me.

At first, I started listing many of the models that I had used over the years. Later, I began thinking about models that needed to be included in the new book. It has been a fun project and a new publication that I expect will become one of my best selling works. It's not often you have the opportunity to create a uniquely different product like I believe **IT Management Models** to be.

Using Adobe PDF files as the medium allows me to provide the work in full color and gives you the ability to print out each of the models in their Summary Sheet that includes the picture and bullet points. We intentionally structured the book to allow you to print summaries for the "net" version or you may print the entire book as needed.
III. Components of a model

Let’s look at the parts of a model before jumping into the models themselves. To do this, we will use the example shown earlier, Play your position. I think you will make the connection quickly and it will give you insight into how each model is structured.

First, an important aspect of the layout designed into the model pages is that all models are discussed in two pages. I could have written much more on each model but wanted to keep the discussions at a high level. You can get more in depth insight about many of my management thoughts from the free articles posted on MDE’s web site and from the many books I’ve written.

Every model is presented in this publication so that when you print the material and open up your printed book, the two pages of the model are facing one other so you can see the entire content of the model. See the example below.
A. A picture is worth a thousand words

The most important part of each model is the picture. The picture, or model, is what helps you remember the model and visualize the points made in the Key Points section and the Discussion section.

In the example, Play your position, we use the X's and O's of a football coaching diagram to illustrate the importance of focusing on one's responsibility.

In some cases, the model itself will be obvious while in other cases you may have to read about it to understand what it really means. In all cases, you need to read through the entire model to gain full appreciation for what it represents and means.

We made an effort to use simplistic model graphics that would be easy enough for you to hand draw when using to emphasize points to your staff and others as you go about discussing the model.

Throughout this document we use the term "model" interchangeably with "picture". When you see the term "model", it refers to either the picture graphic like the one above or the entire model document including the descriptive information depending upon the context of the statement.

Note: The number at the bottom left of the model is for easy reference purposes only.
B. Description

A brief description of the model is included beside the graphic of the model. This description is an overview of the model and describes the basic purpose of the model.

C. Key points

The Key points section of each model is essentially a short bullet list of points used to define the model. They are intentionally short and to the point. In some cases, you may not fully understand the point until you read the full description of the model. Once you become truly familiar with a model, the Key points will be easy references to help you when discussing the model with someone.

The approach we take here is similar to how you would construct a PowerPoint presentation. The bullet points are essentially a high level presentation guide to help you understand and explain the model easily.

Each Key point is explained in more depth in the model's Discussion section.
D. Category

Six management categories, also called management disciplines, have been defined to organize the models into logical groups. To do this, my IT Management Process was used since it breaks the management of IT into logical management discipline groups already.

For those unfamiliar with my proprietary IT Management Process, it is a graphical representation (a complex model of sorts) of the approach I take when managing an IT organization. It is also the foundational structure I use in teaching MDE's IT Manager Institute. If you haven't taken a close look at this program, you should. It is unique and includes the most comprehensive IT manager development curriculum and support in the industry. Information is available at www.mde.net/institute.

Mike Sisco's IT Management Process
The IT Management Process follows a structured approach to managing IT. We use this structure to break IT Management Models into six primary management disciplines, or categories:

1. Assessment
2. Strategy and planning
3. Project management and process
4. Organization & staff
5. Financial management
6. Measurements and communication

In each of the models, a red X will denote the category, or categories, that the model belongs in.

At the end of the book, each category is summarized with all the models that fall into that category. It's a great way to pull out the models that pertain to a particular management discipline (category) when you want to refresh your memory on that particular management area.

Some models fall into multiple categories, as you will see. By grouping the models into categories, we create a learning process in two ways. You have the ability to study a management discipline category such as "assessment" or you may review individual management models to learn new concepts one at a time. More is discussed on this in the chapter titled, Organization of the book.
E. Discussion

Each model includes a detailed **Discussion** section to explain the model in more detail.

In addition, each bullet point is expanded upon so you understand the perspective I make with each **Key point**. Once you are comfortable with a model, you will probably only refer to the **Discussion** section for review or to update your understanding of the model.

![Discussion content with play your position diagram](image-url)
IV. Organization of the book

Effort has been made to make this document both a working document as well as a reference document. As you get familiar with it, you will find many subtle aspects that are intentionally designed within to make it more useful for you day to day.

The very first decision we had to make was how to approach the delivery of the material. With more than 70 models in all, it came down to two options. You may choose either option depending upon what you prefer.

**Option 1** - Work through the models one by one and learn a new model every day, or simply read through the entire book in one or more sittings. When completed, you should pull out the IT Management Models Category Summary section and develop an understanding of why certain models fall into the category or categories they fall into.

**Option 2** - My recommended approach is to follow the IT Management Models Category approach and work through each of the models in a given category. Focus on a single category and develop an understanding of all the models that are in it before moving to the next category. To do this, print out either the chapter IT Management Models Categories or the chapter IT Management Models Summaries. Use the lists, or charts, as a guide by which to review each of the models in the category. Be sure to follow the sequence they are listed in as they have been placed into a logical sequence conducive to learning the management models for that category.

The lists provided in the IT Management Models Categories chapter include a "check off" feature so you can track your progress.

Following the IT Management Categories guide option (Option 2) resembles my approach in teaching the IT Manager Institute. In other words, I follow my proprietary IT Management Process and use a logical approach of working through the material by management discipline. That way, you focus on one management skill area at a time.

Either approach you choose is fine and ultimately it's a matter of how you prefer to read and learn the material.
At the end of the publication, two reference chapters will come in handy.

1. **IT Management Models Category Summaries** chapter. This section gives you a quick reference for all the models that apply to a specific management discipline category. They are arranged in a logical sequence to learn about the management discipline category.

2. **IT Management Models Reference Index** chapter. This is a reference point listing all the models and pointing to the category groups they belong to.

You will find that the models have been formatted so that the first page of each model looks like a PowerPoint slide in that it includes only the image of the model, a brief description, key bullet points, and a reference to the categories it belongs to. If printed in duplex mode, this part of the model is always on the left page of an opened book so you can see it when reading the Discussion section for the model which will be on the facing page and right side of the book.

Another tool included with the digital version of this book is the **IT Management Models Summary Guide**. It is a separate publication providing the 1-page summary of each model in numerical order. Included is a reference table of the IT management disciplines (categories) for quick reference. This is what I would print and carry around with me, i.e. less weight and a great little reference tool.

These formatting approaches provide flexibility and allow you to print parts of the book as you prefer and to have available as reference in your day to day activities.

The following discussion describes more about the contents within this publication and how to use it to your best advantage.
A. IT Management Models Category Groups

There are six major categories pulled from my *IT Management Process* that are used to group the models. It made sense to approach the book just as I approach managing a new IT organization in order to create a logical flow for presenting the material.

In a few cases, I combined two management disciplines into one category. An example of this is the *Project management and process* category. This works well in that the models that fit into either discipline fit well into the combined category.

Let's review the management disciplines, or categories.

1. **IT Assessment** - This category applies to management issues related to assessing the technology of a company. One of the most important parts of succeeding as an IT manager is being able to assess your situation. IT Assessment is the first part of my *IT Management Process* and sets the stage for succeeding in any IT management role.

2. **IT Strategy and Planning** - This category pertains to prioritizing IT initiatives, developing strategy, and planning. All are very important components in managing technology resources effectively.

3. **IT Project Management and Process** - This category includes two disciplines that go hand in hand toward creating credibility and smooth operation of your technology organizations. Models that relate to managing projects or implementing change are included in this category.

4. **IT Organization and Staff** - Building an IT organization and managing, developing, and motivating staff requires many skills. The models that help you address these two disciplines are found in this category.

5. **IT Financial Management** - Budgeting, asset management, managing an operational P&L (Profit and Loss) Department require several management insights. This category will provide financial management insight into the financial engine that runs a company.

6. **IT Measurements and Communication** - Measuring results tells you where you are and how well your operation is doing. Communicating well is what ties all the management disciplines together into a cohesive management approach. These two disciplines compliment one another a great deal.

More is discussed about each management discipline in the chapter *IT Management Models Categories*. In addition, there is a list of all models included in each of the categories. Throughout this book, we use IT management models "category" interchangeably with IT management "discipline".
B. The IT Management Models

The models are presented in this chapter. There are two pages of information for each model.

C. IT Management Models Category Summaries

After the Models chapter, a chapter titled IT Management Models Category Summaries provides a reference of all the models for each category. This chapter is a quick reference and reminder tool. Print these out for handy guides to insert in your notebook. It includes just the graphics of all the models organized by category for a quick glance and reminder.

Category Summary Example - IT Assessment

As you can see, these summary category sheets can be quick reference tools to show you all the models associated with a particular IT management discipline such as in the IT Assessment Category example above.
D. IT Management Models - Reference Index

The other reference tool that can be of help is the IT Management Models Reference Index section near the end of the book. In this list, each model is listed in numerical sequence and includes the categories it is associated with and the page(s) within this publication where it is discussed.

This tool can be helpful when you are looking up detail information regarding a specific model.

*Note: The model number at the bottom left of the graphic is only for reference.*

<table>
<thead>
<tr>
<th>IT Management Models INDEX</th>
<th>IT Management Models INDEX - P.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope creep</td>
<td>42</td>
</tr>
<tr>
<td>1 + 2 = 5</td>
<td>44</td>
</tr>
<tr>
<td>High road - Low road</td>
<td>46</td>
</tr>
<tr>
<td>IT Project Priority Hierarchy</td>
<td>49</td>
</tr>
<tr>
<td>Career Paths</td>
<td>50</td>
</tr>
<tr>
<td>FTP or PTF</td>
<td>52</td>
</tr>
<tr>
<td>Expect the Unexpected</td>
<td>54</td>
</tr>
<tr>
<td>Prevent Fires</td>
<td>66</td>
</tr>
<tr>
<td>What Goes Up Must Come Down</td>
<td>69</td>
</tr>
<tr>
<td>Communication Circle</td>
<td>62</td>
</tr>
<tr>
<td>What Goes Around Comes Around</td>
<td>66</td>
</tr>
<tr>
<td>Open Door Policy</td>
<td>64</td>
</tr>
<tr>
<td>Change Management Processes</td>
<td>66</td>
</tr>
<tr>
<td>Key New Hire</td>
<td>66</td>
</tr>
<tr>
<td>Training plan</td>
<td>70</td>
</tr>
<tr>
<td>Murphy’s Law</td>
<td>72</td>
</tr>
<tr>
<td>Create Vision</td>
<td>74</td>
</tr>
<tr>
<td>Decision Making</td>
<td>76</td>
</tr>
<tr>
<td>Ready - Aim - Fire</td>
<td>78</td>
</tr>
<tr>
<td>Target your efforts</td>
<td>80</td>
</tr>
<tr>
<td>Pressure points</td>
<td>82</td>
</tr>
<tr>
<td>Strategy basics</td>
<td>84</td>
</tr>
<tr>
<td>Bite the head of a dog</td>
<td>86</td>
</tr>
<tr>
<td>Drain the swamp</td>
<td>88</td>
</tr>
<tr>
<td>Lines of fire</td>
<td>90</td>
</tr>
<tr>
<td>Snails crawl, ants fly</td>
<td>92</td>
</tr>
<tr>
<td>2 birds with 1 stone</td>
<td>94</td>
</tr>
<tr>
<td>Bottlemac</td>
<td>96</td>
</tr>
<tr>
<td>The main thing is not to get excited</td>
<td>98</td>
</tr>
<tr>
<td>Invest in yourself</td>
<td>100</td>
</tr>
<tr>
<td>Not it out</td>
<td>102</td>
</tr>
<tr>
<td>In sync</td>
<td>104</td>
</tr>
<tr>
<td>Management Basics (ADCP)</td>
<td>106</td>
</tr>
<tr>
<td>Do the right thing</td>
<td>108</td>
</tr>
<tr>
<td>Win-Win</td>
<td>110</td>
</tr>
<tr>
<td>E-go - sack</td>
<td>111</td>
</tr>
<tr>
<td>Charge Facilitator</td>
<td>114</td>
</tr>
<tr>
<td>Play Your Position</td>
<td>116</td>
</tr>
<tr>
<td>Management Layers</td>
<td>118</td>
</tr>
<tr>
<td>Define Responsibility</td>
<td>120</td>
</tr>
</tbody>
</table>

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V. IT Management Models - Categories

This chapter discusses each of the IT Management Models in context within the six management disciplines they belong to. As mentioned earlier, the categories are presented in a logical fashion of how you should approach managing a new IT organization.

The six management disciplines, or categories, include:

A. IT Assessment
B. IT Strategy and Planning
C. IT Project Management and Process
D. IT Organization and Staff
E. IT Financial Management
F. IT Measurements and Communication

Each section begins with a discussion about the management discipline category and the importance it has in operating successfully in an IT management role.

Another document is available. IT Management Models Summary Guide is a separate document produced that compliments this main document. It is a handy reference guide that I think you will find useful.

This guide includes the graphic, management discipline category identification, and key bullet points but has no discussion. This is an excellent document to print out for easy and quick reference and is much smaller.

As you get into the book, you will likely think of many other models that fit your needs. When you do, take a moment to draw a rough sketch of the model and jot down the key points. It will help you develop your "management personality" over time far beyond what we have given you in this document. There is a New Model Template at the end of the book to help you in this effort.

Remember, you never stop learning how to manage effectively. It is an area that is truly dynamic because as soon as you think you have seen and heard everything, that's when you discover something entirely new.

Good luck and best of success in your management efforts.
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A. IT Assessment

Assessing your situation is one of the very first things you need to do when managing a new IT organization. This management discipline sets the stage for your ability to manage effectively.

An accurate technology assessment will discover several things:

1. Identifies needs and objectives of the company and your internal users or external clients.
2. Identifies technology issues that exist
3. Identifies capacity of the technology resources
4. Identifies capability of the technology resources
5. Identifies risk and opportunity that exists

The assessment process is the step that allows you to be successful. It doesn't guarantee that you will be successful, but you don't have a chance if you can't determine what the real needs are.

An accurate technology assessment will help you:

1. Target IT initiatives that address company needs and align technology resources with company direction and objectives.
2. Target IT initiatives to meet user and client needs.
3. Improve client satisfaction by focusing on your client's true needs.
4. Improve your organization's productivity.
5. Prioritize initiatives appropriately to gain the best results early.
6. Develop an immediate and a strategic plan.

If you are interested in some of the best tools in the industry to help you conduct a thorough IT assessment, take a look at my book titled *Acquisition: IT Due Diligence*. This publication provides a comprehensive process and all the tools you need to conduct an effective technology assessment.

Based upon my experience in conducting more than 40 IT assessments, you will find this information invaluable in helping you size up any IT situation you come across. Information is available at [www.mde.net](http://www.mde.net).

The models included in this section are about assessing your technology situation effectively in order to focus your resources on appropriate issues. As the saying goes, "You can't hit the target if you don't know what you are shooting at."
IT Assessment Models
B. IT Strategy and Planning

This section actually includes two separate disciplines that work closely together. Developing a strategy is essentially defining short and long term objectives, or priorities, that can be accomplished by focusing your resources on specific initiatives and that address your technology issues.

The planning part is where you develop detailed plans of how and when you plan to go about implementing these initiatives.

Managers who develop strategies and plans are seen as proactive managers and not reactive managers. It's an important distinction in developing your track record and credibility.

One of the books I've written is Building a Strategic IT Plan. It provides a practical and simple approach to developing strategic IT plans for your company. Check it out at www.mde.net.

The models in this group will provide additional insight to help you strategize and plan your IT organization's activities in providing value to your company.
B. IT Strategy and Planning Models

2. 2 + 2 = 5
3. High Road - Low Road
4. IT Project Priority Hierarchy
7. Expect the Unexpected
6. Fail to Plan: Plan to Fail
9. What Goes Up Must Come Down
8. Prevent Fires
11. What Goes Around Comes Around
16. Murphy's Law
18. Decision Making
19. Ready - Aim - Fire
20. Target Your Efforts
17. Create Vision
21. Pressure Points
22. Strategy Basics
24. Drain the Swamp
32. In Sync
27. 2 Birds With 1 Stone
35. Win - Win
36. 5 Pound Sack
33. Management Basics
34. Do the Right Thing
37. Change Facilitator
45. Manage Expectations
58. Help Desk
65. Scalability
64. Stability
52. Uptime is King
53. Disaster Recovery
54. Backup
48. Think Out of the Box
72. Bubble Effect
60. Experts and Depth
25. Lines of Fire
14. Key New Hire
62. Focus
15. Training Plans
71. Performance Plans
67. 0 to 180 in 30 Days
30. Invest in Yourself
C. IT Project Management and Process

The key to establishing management credibility is in creating a track record that shows that you "do what you say you will do and when you say it will be done". Another way of putting this is that credible managers deliver project initiatives "on time and within budget".

Managing projects effectively and predictably is critical. It is the critical cornerstone that sets you up to achieve success as an IT manager.

Need funds to do that next project? From experience, I can tell you that you have an excellent chance of getting the funding if you have the track record that shows you "get the job done". In contrast, you will have an uphill battle getting your manager to support your funding request if you have a poor track record.

Need practical material and tools to help you manage IT projects better? Take a look at IT Project Management, a practical approach at www.mde.net.

Too much of a poor track record and most senior managers will start looking to help you find other places to be successful.

Establishing processes that help your operation perform well and manage the expectations of your clients is a key component in creating a smooth operating environment. When people know how to process change requests, have automatic escalation and follow-up procedures in place and follow them, and train the clients on how to work with your IT department, the operation can run much more smoothly.

The models in this section provide insight into the project management and process disciplines of managing IT.
C. IT Project Management and Process Models

- 6 Fail to Plan : Plan to Fail
- 3 High Road - Low Road
- 10 Communication Circle
- 57 Project Management
- 8 Prevent Fires
- 7 Expect the Unexpected
- 21 Pressure Points
- 24 Drain the Swamp
- 20 Target Your Efforts
- 19 Ready - Aim - Fire
- 18 Decision Making
- 23 Bite the Head of a Frog
- 1 Scope Creep
- 26 Snails Crawl : Birds Fly
- 16 Murphy's Law
- 48 Think Out of the Box
- 40 Define Responsibility
- 35 Win - Win
- 36 5 Pound Sack
- 34 Do the Right Thing
- 70 Effective Meetings
- 31 Net it Out
- 62 Focus
- 44 Listen
- 38 Play Your Position
- 56 Quality assurance
- 55 Verify References
- 28 Bottlenecks
- 41 Every Day is a New Day
- 29 The Main Thing is Not to Get Excited
- 59 Observe
- 49 Problems are Opportunities
- 66 Reward Desired behavior
- 61 I Knew This was a Snake when I Picked It Up
- 27 2 Birds With 1 stone
- 13 Change Management Processes
- 52 Uptime is King
- 63 Escalation
- 53 Disaster Recovery
- 54 Backup
- 58 Help Desk
- 68 Measurements
D. IT Organization & Staff

Developing a world class organization that has the capacity and skill to support your company is a challenging endeavor. It takes insight, experience, and management skill to "right-size" an IT organization so it is functional, capable, and cost effective.

The changes taking place in technology and in company organizational needs is only going to increase over time. Gaining insight into the art of organizational management is necessary to achieve management success.

Likewise, managing people is definitely more of an art than a science. Why? Because people are all different and in some cases they are even different from day to day. However, there is a science, or process, you can use to motivate and develop your IT staff.

Two books have been written about these topics. Building a Successful IT Organization focuses on the organizational management aspect while IT Staff Motivation and Development focus on the people management part. Information on both of these books is available at www.mde.net.

The models in this section provide insight and ideas that will help you manage both the organization and your staff more effectively.
D. IT Organization & Staff Models

2 + 2 = 5
High Road - Low Road
Career Paths
Expect the Unexpected
Key New Hire
Training Plans
What Goes Around Comes Around
Open Door Policy
Murphy’s Law
Decision Making
Ready - Aim - Fire
Target Your Efforts
Pressure points
Bite the Head of a Frog
Drain the Swamp
Lines of Fire
Snails Crawl : Birds Fly
2 Birds With 1 Stone
The Main Thing is Not to Get Excited
Invest in Yourself
Do the Right Thing
Win - Win
5 Pound Sack
Verify References
Define Responsibility
Play Your Position
Manage Expectations
Follow-up
Every Day is a New Day
Be Selfish
Set the Tone
Listen
Observe
Experts and Depth
Focus
Reward Desired Behavior
Escalation
Stability
Scalability
Measurements
Effective Meetings
Performance Plans
E. IT Financial Management

Managing the cost of technology in your company is essential. You may not have financial responsibility for your IT department today but the higher you move up the management ladder the more involved you will become.

Budgeting and managing the financial performance of the IT organization are primary responsibilities of any CIO. In addition, the IT organization is in a unique spot within the company to have dramatic impact on the financial results of the company.

The earlier you get involved in understanding how the financial engine of a company works and what's important in operating a company profitably the better.

Read Developing an IT Business Plan to help you get started quickly in understanding the financial side of managing an IT operation. Information is available at www.mde.net.
E. IT Financial Management Models

69 Understand the Business
7 Expect the Unexpected
50 Budget Buffers
51 Cost Saving Strategies
21 Pressure Points
16 Murphy’s Law
72 Bubble Effect
18 Decision Making
20 Target Your Efforts
68 Measurements
F. IT Measurements and Communication

This last category may not seem that important, but it includes the barometer of your performance and the management discipline that will make or break you on the road to success.

Measuring key components of your IT business is what tells you when you are accomplishing things according to plan, whether you are operating cost effectively, and how responsive your operation is in meeting user and client needs. Measurements are a vital component to achieving success in any management role and helping you improve the results of your operation.

Communicating effectively is the management discipline that can enhance your position beyond almost anything else. Sure, you have to produce results; but the manager who can communicate effectively in managing client and user expectations will excel over the manager that produces results but cannot communicate effectively.

The models in this category are extremely important elements in helping you achieve more success.
F. IT Measurements and Communication Models

- 10 Communication Circle
- 45 Manage Expectations
- 44 Listen
- 17 Create Vision
- 43 Set the Tone
- 70 Effective Meetings
- 11 What Goes Around Comes Around
- 46 Follow-up
- 9 What Goes Up Must Come Down
- 31 Net It Out
- 12 Open Door Policy
- 68 Measurements
VI. The IT Management Models

The following pages are what you have been waiting for - the seventy-two IT Management Models.

The models have been presented on the pages so that if printed out into a book, you will see the model with bullet points on the left and the discussion on the right side when opening up the book.

Sample model page layout
The models themselves are in no particular order although they are numbered for reference. As mentioned in an earlier chapter, you may review one model at a time and walk straight through them all until finished, or you may use the lists provided in the **IT Management Models Categories** chapter to review models that relate to specific management disciplines, or category.

Either way you decide to approach learning the models in this publication, we hope you enjoy the journey and find the models to be effective in coaching others, planning activities, and supporting your company in your IT management role.
1. **Scope creep**

**Description:**
Scope creep is one of those elements that tries to find its way into every project. Left unchecked, almost any project will become larger than what was initially planned. Increases in project scope are warranted at times, but we all have to be conscious of the cost and impact additional requirements have on the project.

A conscious review of the impact should be made to determine if additional requests are valid and appropriate for the company, i.e., does it provide real value. Ask yourself and the requestor, "Is it necessary and provide tangible value, or is it just nice to have?".

**Key points:**
- Projects tend to grow in scope
- Document specific deliverables
- Define how additions are approved that increase scope
- Stay focused to the defined objectives

**Category:**
- IT Assessment
- IT Strategy & Planning
- **x** IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Projects tend to grow in scope - People don't always think through the detail when first initiating a project unless a project manager or IT manager does a good job of forcing the issue. It's often not until the project begins do they really start thinking about what they want in the final outcome. Scope creep is a normal occurrence. Rather than fight it, understand that it will occur and manage the dynamics of it. The key to managing scope creep is managing the expectations of the client as to the true impact new requirements will have on the project in terms of time, cost, and resource needs.

Document specific deliverables - You don't have a chance in managing client expectations if you don't document the specific objectives and deliverables of the project in the beginning.

Define how additions are approved that increase scope - Set the client's expectations right up front about how scope additions should be handled and establish a mutual agreement. When the client knows that scope creep is probable and how you will deal with the issue, it helps both of you manage the project changes to meet the true needs of the client and handle them in a manner that allows you to be successful.

Stay focused to the defined objectives - Many times our own IT employees expand a project trying to make the final "product" better and to please the client. In fact, our employees can be some of the biggest culprits in expanding the scope of a project. Not only do you need to manage the client's expectations, but you also need to coach and manage your own team's expectations and actions.

Inspect projects often and get involved quickly when you suspect the scope of the project is changing. Again, it is quite all right for the scope to expand as long as the client understands the implications and expects the appropriate delivery of the project.
2. 2 + 2 = 5

**Description:**
The whole is greater than the sum of its parts.

Leverage is very important in managing any operation. It is especially true in technology. There are many scenarios in IT where you can do things to get more than the sum of the parts.

For example, working on several programming requests that affect the same program often buys you a productivity boost. Likewise, taking the best of two companies' technologies can make a merger of the two companies a much more powerful company than either might have become on their own.

**Key points:**
- Combining two assets can produce results greater than their sums
- Look for complimentary elements
- Team member differences can be powerful assets
- Look for "win-win's" and leverage opportunities

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

2 + 2 = 5

Opportunities abound in technology support to leverage situations. Think of the idea of adding "two plus two" and coming up with "five" versus "four".

As an IT manager, we should always look for leverage opportunities. It can be anything from combining two programming requests that affect the same program into one project to finding multiple skills needed for your staff in one new hire.

You might also find the opportunity to combine the technologies of an acquired company and your parent company into a technology strategy that is much more powerful than what you would have produced at either company. Such a combining of the positives of the two companies offers significant leverage for the two companies and possibly a significant competitive edge.

**Combining two assets can produce results greater than their sums** - To find these types of opportunities, you have to look for them. They exist in every corner and aspect of technology. Stay alert to possibilities and look for combinations of things that boost productivity.

**Look for complimentary elements** - If you need to take a physical inventory of all the technology assets in a company, you can ease the pain by collecting the information when one of your staff visits a remote office to do other work. Add the inventory task to his/her list of "to do's" and you will leverage your staff's time and productivity. Combine a project need into a routine support task to leverage people's time.

**Team member differences can be powerful assets** - Combining two complimentary, yet different sets of skilled employees on a project can give you significant advantage and a higher likelihood of project success. Taking advantage of people strengths and reducing the impact of their weaknesses is a management focus we must all have.

**Look for "win-win's" and leverage opportunities** - When doing things to correct a client satisfaction issue, add a little extra to the solution that goes a long way in showing the client your team is responsive to their needs. The "little extra's" can be powerful components to a solid client relationship that benefit both companies for years to come.

I look for leverage opportunities all the time. One of the best examples I've seen is when movie producers film one movie but have enough material to produce a sequel or complimentary film. When you think hard enough, you will find many opportunities in technology to get "five" from adding up "two plus two".
3. High road -- Low road

Description:
There is more than one way to achieve a set of objectives. Multiple paths can lead to the same goal and one can be just as effective as the other.

The path is not nearly as important as being able to achieve the desired result. When managing your staff, provide flexibility in your people's ability to choose their own path as long as it continues to be productive, cost effective, and achieves the objective.

Key points:
- More than one way to accomplish an objective
- Different approaches can lead to the same result
- Managers must allow their staff and new managers to take a different path
- Beware the "detour" signs

Category:
- IT Assessment
  - IT Strategy & Planning
  - IT Project Management and Processes
  - IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

The real objective is to reach the destination in a productive and cost effective manner. How we get to that destination is not always as important as simply getting there.

Managers will not always take the same approach as one another, but that's quite all right. Have ten managers develop an IT strategy for a $500 million company and you will likely get ten different strategies, and every strategy may be very effective for the company. In each of their strategies, there will probably be similarities to the other nine strategies, but each manager's strategy will have some uniqueness to it.

Is one strategy better than the other? Not necessarily, especially if they all end up helping the company achieve its goals and objectives.

**More than one way to accomplish an objective** - What's that old saying? "There is more than one way to 'skin a cat'." It applies very much in managing technology resources. One of the big mistakes we can make is to assume "our way" is the only way to do things. Certainly, there needs to be standard operating procedures for many things, but there are also many areas where alternative approaches can be acceptable, even preferable.

**Different approaches can lead to the same result** - Give two project managers the exact same project and I guarantee you will find the their project plans will differ quite a bit. Tasks will be different with different timelines for many things. Even responsibilities may end up being different. The projects may look very dissimilar, yet both can achieve the objective cost effectively and productively.

**Managers must allow their staff and new managers to take a different path** - Give your people latitude when asking them to assume responsibility. Being able to develop your own "path" to achieve an objective is one way to empower people. Observe, monitor, and coach as needed to keep them on track but give them some flexibility to decide for themselves and even to make mistakes. Just try to prevent the catastrophic mistakes. You will find that this latitude does a lot for building teamwork and loyalty.

**Beware the "detour" signs** - Seasoned managers know where the major "road blocks" exist with certain types of projects. Share your insight with your manager to avoid the "big mistake" or causes a major loss of productivity. Helping reduce another's learning curve is a good thing, but give them the room to use their own judgement as you develop their management and professional skills capabilities.
4. IT Project Priority Hierarchy

Description:
A structure exists in how you should prioritize new projects. The IT Project Priority Hierarchy model depicts the foundation layers that are needed to create a stable technology environment.

Establishing basic services and functions first creates a foundation that can be built upon.

Without a solid foundation, you ultimately achieve less than what you should be able to accomplish.

Key points:
- Start with a solid foundation
- Resist the need to work at the top until ready
- Work multiple layers as you are able
- "Pay me now or pay me later"
- Real value is in top 2 layers
- Stability leads to long term results

Category:
- IT Assessment
- IT Strategy & Planning
  - IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Picking the right IT initiative priorities for your company sets you up for long term achievement and stronger results. In other words, pick the right priorities and you will accomplish more and go faster over time than if you don't.

You will also gain recognition as a manager who has IT priorities properly focused in building a stable environment. Taking shortcuts can provide quick results, but long term progress will only be made when the right technology components are in place to support your progress.

**Start with a solid foundation** - The bottom three layers are essential for a stable technology environment. Building an organization that is capable of supporting the business and focused to its true needs will lead to progress. Establishing an infrastructure architecture that provides basic connectivity services and can be scaled for growth will be vitally important before pushing projects aggressively in the top two layers.

**Resist the need to work at the top until ready** - The desire will be to do strategic projects and business application projects. You can go there quickly but be sure the lower layers are firmly in place to support your efforts or you will have to return and repair some of the "breakage" that is likely to occur.

**Work multiple layers as you are able** - It is normal to work on projects in multiple layers. Just be certain to have what you need in the bottom layers to support your efforts as you start higher layer initiatives.

"**Pay me now or pay me later**" - Sooner or later, the bottom three layers have to be dealt with. These are not the exciting projects necessarily, but they are critical in building a foundation that supports growth.

**Real value is in top 2 layers** - CEO's and other executives want you to work in the top two layers. That's where the real business value exists. Concentrate on getting your technology foundation firmly in place and you will ultimately be able to make progress much faster. It may be a little slower getting started, but you will accomplish much more in the long run.

**Stability leads to long term results** - Create stability with architectures and processes that support growth in the bottom three layers and strategic projects become much easier to work on.
5. Career Paths

**Description:**
People are interested in getting ahead and what it takes to achieve more. Career paths are effective tools to help the individual learn what's available to them and how to go about achieving their professional goals.

Individuals are all different and therefore their career paths will be unique to their situation and needs.

Career planning is a two-way effort and not just the manager's responsibility.

**Key points:**
- Identify where you are
- Determine the type of work you really like to do
- Enjoying your work and responsibility is 70% of the issue
- Think two or three steps out
- Prepare for your next step
- Be sure you really want the next level before taking it
- Career planning is both employee and manager responsibility

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- **IT Organization and Staff**
- IT Financial Management
- IT Measurements and Communication
Discussion:

Your employees are interested in "how to get ahead". Every employee is different with a unique set of needs and varying goals. Employee career planning is a part of managing people that many managers do not provide or know little about. However, every employee deserves a manager's help in looking at their career.

Employees are not always prepared for a career planning session because they haven't taken the time to think about their career. Career sessions can initiate the process.

**Identify where you are** - First step is to identify the position and level of responsibility the employee has currently.

**Determine the type of work you really like to do** - I always try to focus an employee on the type of work he/she likes to do versus the position of responsibility. Too many people get caught up into looking at a position or title without any idea as to whether they are suited for the role or would even like the work. I ask people to "think about the type of work that makes them want to race to the office because they like it so much".

**Enjoying your work and responsibility is 70% of the issue** - Enjoying what you do and who you work with is well over half the battle. Get these things in place and career will take care of itself.

**Think two or three steps out** - Use the chart similar to the model to map out future roles that fall into the line of work you like. You should coach the employee to look at least two steps out so that the next step the employee takes positions him for the role as opposed to blocking the advancement.

**Prepare for your next step** - When you know what the next level position is, prepare for it by attending class, seeking projects that prepare you for the role, and find a mentor that can help you learn about the new responsibility.

**Be sure you really want the next level before taking it** - In some companies it is difficult to go back to a previous job once you have moved into a new responsibility. Some of the reason is that the employee often feels a sense of failure and may actually leave the company. In other situations, there may no longer be a need in the former position, managers are reluctant to reduce the salary that allows you to go back, etc. Be sure you really want the job in a higher level before pursuing it.

**Career planning is both employee and manager responsibility** - It is just as important for the employee to initiate career discussions as it is the manager. Make the employee aware of this so he knows.
6. FTP or PTF

**Description:**
Planning requires effort and commitment. It is much easier to avoid planning so most do just that unless someone asks for a plan.

Planning sets you apart and positions you to achieve more than you will when you do not plan. Target goals and develop plans to reach them and you will find yourself achieving more success.

**Key points:**
- It is easy to not plan
- Planning is proactive
- Planning separates you from the "pack"
- Planning positions you for success and to achieve more
- "Winging it" will fail over 50% of the time

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

<table>
<thead>
<tr>
<th>Fail to Plan</th>
<th>Plan to Fail</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTP</td>
<td>PTF</td>
</tr>
</tbody>
</table>

Planning doesn’t come natural to most. It requires focus, considerable thought, and real work. Because of this, many managers don’t do a lot of planning. It is easier to respond to situations than to develop a proactive plan to reach for new objectives.

One thing is certain in that those who fail to plan achieve much less than those who do plan. In addition, avoiding the effort to plan is almost a sure guarantee for failure. If you want to succeed as an IT manager, learn to plan.

*It is easy to not plan* - It is so much easier to let yourself get into the mode of reacting to situations than to plan and develop strategies. This is especially true in IT because we deal with so many issues on a day to day basis. Create a plan that eliminates the source of many of these issues and you may find that you don’t have to live in such a reactive world. Planning takes time and is real work, but once you get into the habit of planning it becomes much easier.

*Planning is proactive* - Those who plan are viewed as proactive managers who choose to take charge of their destiny. Choosing to be a manager who develops a strategy and plans is the first step in achieving real success in your career.

*Planning separates you from the "pack"* - Planning will separate you from those who do not plan. Senior managers are looking for first line and middle managers who can identify issues, create a strategy to address those issues, and build plans that deal with them proactively without having to be told to do so. Planning exhibits maturity and a management style that can be left alone to manage more independently because the results will be more predictable.

*Planning positions you for success and to achieve more* - Planning creates a much higher likelihood for success. The managers who show they can take care of business and accomplish things are quickly identified as managers who can assume more responsibility. Planning indicates a level of maturity that senior managers need in their company and it is a talent that can boost your career.

"Winging it" will fail over 50% of the time - A "wing it" approach is very reactive and one that tends to execute without a lot of thought. This type of approach fails more than it succeeds and it can create considerable damage. If you have employees and managers who like to "shoot from the hip", coaching them for a more planned approach so the results are more predictable is in order.
7. Expect the unexpected

**Description:**
Managers who anticipate "what could happen" often avoid the problems others seem to incur on a regular basis.

Anticipating issues and potential impacts to your systems should be second nature to an IT manager. **Expecting the unexpected** positions you to be in a much stronger preventive mode than a reactive one.

**Key points:**
- Systems failure can come from any direction
- "If it can fail, it will fail"
- Anticipate and plan your response for any contingency
- Coach teams and employees to anticipate

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
  - IT Measurements and Communication
Discussion:

**Expect the Unexpected**

Technology is more reliable than ever before, but it can and will fail. In an environment where we are expected to implement change as part of our job functions, we actually create situations that introduce the opportunity for systems failure.

Managers should be prepared for the unexpected to happen. It's not something we need to be paranoid about, but if we are to be prepared, we need to anticipate it.

**Systems failure can come from any direction** - Technology systems can fail for any number of reasons, many of which we have absolutely no control over. Consider the failure points and possibilities that can cause failure and "expect the unexpected".

"If it can fail, it will fail" - Any component of your systems can and probably will eventually fail. Disk crashes on the most reliable computer systems fail. Internet servers lose connectivity. People get sick and miss work, or even leave your company. If it can fail, the best approach is to acknowledge that it can and will fail and prepare accordingly.

**Anticipate and plan your response for any contingency** - We normally don't expect a "500-year flood" to occur, but it certainly can. If you have ever been through one, you know the devastation such a disaster can leave behind. IT managers who expect that such a disaster could happen and plan accordingly are prepared for such disasters.

**Coach teams and employees to anticipate** - Coach others to anticipate what they don't plan for. This may sound strange but want people in your organization to think about the things that can go wrong and build into their processes and architecture preventive measures when it is cost effective and makes sense to do so.

You won't be able to afford the level of redundancy in your technology environment to prevent every issue that can cause problems, but anticipating what can go wrong and thinking through your possible contingencies can position you to minimize the impact.
8. Prevent fires

**Description:**
In managing technology resources, we need to be more in the mode of "fire prevention" (problem prevention) than in "putting out fires" (solving problems after they occur).

We probably always need to know how and be able to put the fires out, but more effort should be placed on fire prevention. It will lead to a more stable and productive business environment.

**Key points:**
- Preventing fires is much more valuable than fighting fires
- Must be able to fight fires but spend money and effort on prevention
- Identify fire sources and target prevention initiatives
- Preventing fires improves client satisfaction

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Our IT support operations have to be able to "fight the fires" (fix problems) when they occur with our technologies, but we want to be in more of a "fire prevention" mode than the reactive mode of fighting fires after they occur.

In order to prevent fires, you have to discover what causes the problems and technology issues in your operation. There are many ways to do this such as "post fire mortems", analyzing Help Desk data, etc.

Preventing fires is much more valuable than fighting fires - Preventing problematic issues is often so much more productive and beneficial to the company than fixing the problem after it occurs. Make it your business to identify the source of problems to turn a reactive environment into a preventive environment.

Must be able to fight fires but spend money and effort on prevention - Every IT organization must at times deal with problematic issues, even a small disaster. Being prepared to fight the fire when it occurs makes perfect sense, but spend money and focus effort in identifying what causes them and preventing them.

Identify fire sources and target prevention initiatives - Take action to discover the sources of problems that your organization deals with and develop processes and procedures or make prudent investments that prevent these problems from occurring in the first place.

Preventing fires improves client satisfaction - Minimizing the source of problems will help improve productivity of your team. This productivity boost along with a reduced level of problems your clients have to deal with will improve client satisfaction significantly.
9. What goes up must come down

**Description:**
Every company will face adversity as well as challenging times. Companies, industries, and the economy tend to follow trends. If times are good, be thankful and be aware that tougher times will be faced sometime in the future.

Managers are responsible for improving things. If your company is dealing with tough challenges, persevere and focus to improve your situation.

**Key points:**
- Every company faces "good times" and "bad times"
- If it's bad, it can always get better
- Managers work to improve things
- If it's great, beware the negative influences

**Category:**
- IT Assessment
- IT Strategy & Planning
  - IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
- IT Measurements and Communication
Discussion:

The best way to be prepared for a business downturn is to realize that it is going to happen from time to time. Every company and industry goes through phases of healthy growth and painful downsizing or reorganization.

Today as I write this material, the healthcare sector is booming. It was just a few years ago that healthcare was a struggling industry trying to redefine itself.

Periods of company growth or decline can both be challenging for an IT organization. Each trend requires a different focus to address the company’s needs and issues. Growth requires planning to ensure systems, processes, and staff are scaleable to support the additional volume and requirements. Trends of decline need more aggressive cost saving strategies and productivity improvements to help the company "weather the storm".

**Every company faces "good times" and "bad times"** - Every company will face its share of stable growth as well as the tumultuous time when the company is in decline. For example, thousands of companies were adversely affected by the dot.com bust and the September 11 tragedy. In most cases, these adverse conditions were not anticipated; but each company had to react as needed to stay in business.

**If it's bad, it can always get better** - If your company is going through difficult times, it can always get better, although it may be a slow, gradual process. Positive outlooks are needed during the tough times and a knowledge that when we focus on the right things the business will improve.

Likewise, if things are very good, be aware that life as we know it can change and can change quickly. Having contingencies for the downside can make it much easier to deal with when the challenge comes.

**Managers work to improve things** - Part of our job as managers is to focus resources on the things that will help improve the company’s situation. This includes anything from the strategy we put into place to the day to day coaching of employees on the "little things" that make a difference. Successful IT managers know that change is inevitable and are adaptable to meet the needs of the current business trend.

**If it's great, beware the negative influences** - Managers should be alert to negative influences that can adversely affect a company. Early warning detection can help you position yourself for the challenges you will incur during a downward trend. You may also be in a position to help the company address the issues to prevent a downturn.

Stay alert and prepare for oncoming company growth or decline issues.
10. Communication circle

Description:
Communicating effectively is a key component for being successful as an IT manager. There are eight separate groups IT managers must deal with. Each has different sets of communication needs from the technology organization.

Learn to identify each group’s needs and be proactive in communicating with them. It will enhance your effectiveness.

Communicating effectively is an important skill for an IT manager’s success and can be a career difference maker.

Key points:
- IT has many groups to communicate with
- Each group has different needs
- All groups need follow-up, status updates, and how to work with you
- Communicating well enhances career opportunities
- Proactive communication defuses concern and confusion
- Communicate at the appropriate level for the audience

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

An IT manager must deal with many groups of people. Every group is unique with different needs from the IT organization. The most successful managers are excellent communicators and have the ability to provide what each group needs to work effectively with his/her IT organization.

Develop processes that help you communicate with the groups on the Communication Circle. Proactive communication is not always easy for an IT manager, especially one who comes from a strong technical background. Formalized status meetings, reports, and processes that keep people "in the light" about what's going on will make your work easier and will enhance client satisfaction.

**IT has many groups to communicate with** - There are at least eight groups you must communicate with as an IT manager. Clients, Users, and Other Managers are at the top of the circle because they are your most important groups.

**Each group has different needs** - Every group has different levels of detail and informational requirements. Take the time to understand what each needs to provide the appropriate level of detail.

**All groups need follow-up, status updates, and how to work with you** - Every group needs your IT organization to follow-up consistently. They also need to know the status of technology issues and how best to work with your organization. Create status update processes to keep everyone in the loop as needed.

**Communicating well enhances career opportunities** - IT managers are often not very strong communicators. Learn to communicate well and put processes in place that facilitate the communication process and you will leverage your career opportunities.

**Proactive communication defuses concern and confusion** - Communicate proactively to reduce or eliminate questions, concern, and confusion. Strong managers learn how to be proactive in communicating with the various groups. It is a skill that defuses many problems and improves client and employee satisfaction.

**Communicate at the appropriate level for the audience** - Senior executives usually need minimal detail while employees and clients tend to need more. Construct your communication activities to give people what they need, but only what they need and not the full detail. Too much detail will lose the attention of many.
11. What goes around comes around

Description:
Do good deeds and good things will happen for you. Be a "giver" and you will receive back many times more.

It's a simple model that works consistently in anything you do, so think about the effect you have on others as you go about managing technology on a day to day basis.

If you want good things to happen, then start by making good things happen for those around you with what you can do.

Key points:
- Your attitude will be rewarded, , , or not
- Good deeds have positive payback
- Responsiveness, follow-up, and teamwork works both ways
- Be a "giver" versus a "taker" and see the positive results
- Those who embrace change achieve more than those who resist change

Category:
- IT Assessment
  x IT Strategy & Planning
    IT Project Management and Processes
- IT Organization and Staff
  x IT Financial Management
- IT Measurements and Communication
Discussion:

What Goes Around Comes Around

How you treat others in both your professional life and personal life has a lot to do with how others perceive and respond to you.

Maintain a positive attitude that overcomes adversity and you will find your employees following your example. Look at the glass of water as "half full" versus "half empty"; it's all about attitude and perspective.

In our technology world, there is plenty of opportunity to become depressed about issues and circumstances that occur. The client that is so difficult to deal with can be a real "pain in the neck", poor employee performance can drive you up the wall at times, and just dealing with traffic in getting to the office can get you down. Don't let it. Approach each problematic issue as an opportunity with a positive attitude and you may be surprised at the positive impact it has.

Your attitude will be rewarded, , , or not - People who approach their work and their lives positively are simply more fun to be around. These people get more from life because they tend to contribute more to others. Approach your responsibilities in a professional and positive way and your chances of success are increased dramatically.

Good deeds have positive payback - Positive things happen to those who do good deeds. I'm not sure what it is, but I can tell you from personal experience that when I do good things by people, I'm rewarded many times more.

Responsiveness, follow-up, and teamwork works both ways - If you want your employees to follow-up and be responsive, then show them that you operate that way. Your employees will follow your example and often times so do your customers.

Be a "giver" versus a "taker" and see the positive results - Managers who give versus those that take receive much more positive results. Teach your employees to be "givers" by finding ways for clients and employees to win when dealing with difficult situations. Giving a client more than they expected creates high levels of client satisfaction and builds loyalty. It works that way for employees and users as well.

Those who embrace change achieve more than those who resist change - One thing is certain in technology: there will be change and lots of it. People who learn how to embrace change and stay flexible will handle the change better and achieve more as a result.
12. Open Door Policy

Description:
Maintain an "open door" policy that gives your employees, clients, and technology users the opportunity to discuss issues and challenges. To do this, you must be willing to listen and positioned to respond appropriately. Being open to input of others without "shooting the messenger" can build trust, and trust will help you manage more effectively.

Key points:
- Be open to employee and client needs
- Communicate your Open door policy
- Take the message received seriously
- Actions send the real message
- Handle issues appropriately
- Follow-up and close the loop on issues

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Employees and clients need managers to work with who are open and willing to listen to their needs. Managing others is much more than giving direction. In order to determine needs and issues, a manager must be able to listen closely to discover what the issues are.

Be a manager who "shoots the messenger" and you will quickly find that employees and/or clients will stop coming to you for help. It's a bad position to be in.

Open door management means you are accessible to your employees and clients and willing to listen to their issues in supporting their efforts.

Be open to employee and client needs - Strong managers encourage clients and employees to share issues with them. These discussions can be early warning signs that give you the opportunity of addressing an issue before it becomes a real problem.

Communicate your "open door" policy - Make your clients and employees aware that you are there to support their efforts and that you have an "open door" policy. Encourage them to bring you issues before they become problems and help them deal with those issues when you have the opportunity.

Take the message received seriously - It takes most employees and many clients a lot of courage to bring a problem to the manager. Give them your undivided attention, listen intently, and be objective in how you deal with the matter.

Actions send the real message - Your actions will tell others whether you truly have an "open door" policy. Everyone watches your actions to determine just what type of manager you really are versus what you say you are.

Handle issues appropriately - Deal with issues objectively and fairly. Just because someone brings you a problem doesn't mean it's now your problem. Some of the best coaching is helping the person learn how to deal with the issue. You should also deal with issues appropriately. If an employee is seeing an issue all wrong, tell him/her that and explain why that's the case, and coach on how to deal with the issue.

Follow-up and close the loop on issues - Open issues need to be closed, else they fester into bigger problems. Take appropriate action to follow-up as needed to close the loop. Remember, it took effort and courage for the person to bring you the issue so follow-up with any commitments made to close the loop. Otherwise, you do more harm and lose credibility.
13. Change Management Processes

Description:
Managing change is one of the most basic parts of managing technology resources. Change management processes establish a structure and a means by which to manage technology in an orderly and predictable manner.

Processes should be implemented in any area of technology where you are making changes to the technology. It will help you manage expectations and maintain a stable operation.

Key points:
- Key processes help you manage a stable, predictable technology operation
- Processes to consider:
  - Change management processes
  - Backup and recovery
  - Escalation
  - Status reporting
  - Performance planning and review
  - "Snow days"
- Document them, communicate them, and educate those affected

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Managing change is a daily requirement of any IT organization. The very nature of our business is to introduce change in our ongoing effort to improve things that help people be more productive, reduce costs, or provide other benefits to the company.

Handling change can happen two ways, with a planned process or ad hoc and without a plan. Effective approaches are planned and deliver predictable results. The ad hoc approach, , , well, the results can vary all over the place and create lots of pain.

Key processes help you manage a stable, predictable technology operation - Implementing change management processes in key areas can help you manage changes that need to occur more effectively and with much more predictable outcomes. Your clients want the changes and they want them implemented without surprise or "pain" as you implement changes in their technology environment.

Processes to consider:
1. Change management processes - Anything that can be cause for a client to request a change should have a change management process in place. For example, desktop adds, deletes, and changes or programming enhancement requests should have formal steps by which to request the change, approve it, and to implement it.
2. Backup and recovery - Implement a formal process and inspect to insure your organization is performing appropriate backups and has workable recovery processes in place.
3. Escalation - One of the easier ways to teach your employees the escalation procedures you want them to use is to create a formal escalation process. It should spell out when something should be escalated, to whom, and how.
4. Status reporting - Implement a process for providing project status to your clients. Keep your clients "out of the dark" and improve client satisfaction.
5. Performance planning and review - Establish a formal process for developing and delivering formal employee performance plans and reviews. Use this valuable tool to focus your employees and to boost motivation.
6. "Snow days" - Spell out how inclement weather days or other unusual circumstances should be handled. Other parts of the country that are not affected by the "weather" issue may depend upon how you handle such situations.

Document them, communicate them, and educate those affected - Document your change procedures and educate those affected to insure they are followed.

Implementing change effectively positions your team for success - Successfully implementing changes for your clients helps your team succeed.
14. Key New Hire

Description:
When you have the opportunity to hire a new resource, take the time to identify the best possible hire for your team. Every new hire is a real opportunity and should be part of your overall strategy in building the strongest team possible to meet your business support needs.

When possible, try to fill several needs with one new hire. Leveraging your opportunity in this area will help you accomplish more faster.

Key points:
- Every new hire is an opportunity
- Seek the resource that can help you the most
- Target multiple needs with a single new hire
- Decide upon entry level versus experienced professional
- An organizational growth plan is just as important as project plans

Category:
- IT Assessment
- ◯ IT Strategy & Planning
- ◯ IT Project Management and Processes
- ◯ IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

**Key New Hire**

When you have the opportunity to hire a new employee, you want to make the best of it. I try to look at every new hire as a key step in carrying out my technology strategy.

Hiring a new resource gives you the opportunity to fill a much needed skill gap, to add depth in a critical support area, and to add someone with maturity and leadership traits when you have such a need.

Target your new hires by identifying specific skills, experiences, and traits you need to help build your team to a world class organization.

**Every new hire is an opportunity** - Each new hire possibility is a unique opportunity given the current circumstances of your organization and company. Make the most of each new hire situation by taking your time to find someone that meets your needs.

**Seek the resource that can help you the most** - At any given time, your needs will be different. When you need to fill a position, take the time to quantify the skills and attributes you need that will help you the most. Be patient enough to find the resource that meets those needs; he or she is out there but may not show up in the first round of interviews.

**Target multiple needs with a single new hire** - Look for any new hire to fill multiple needs that you have. For example, you might fill a specific skill and add seasoned industry experience with someone who also has excellent communication skill and leadership traits. The more the person meets your organizational needs the better.

**Decide upon entry level versus experienced professional** - Make a deliberate decision as to whether you want entry level or experienced people. This philosophy may change considerably over time. Hiring seasoned people allows you to go faster but costs more. Bringing people at entry level and giving them a natural career path can also be a very effective approach.

**An organizational growth plan is just as important as project plans** - It's hard to quantify what you need without an organizational plan. Take the time to build an organizational plan based upon your best estimate of company growth and needs. Having a well thought out organizational plan that quantifies the skills, levels of experience, and employee attributes needed puts you in a strong position whenever the opportunity arises to hire a new resource.
15. Training Plans

Description:
Developing your IT staff has huge implications. It is one of the biggest reasons technology people stay with a company - the ability to learn and grow professionally.

Training and education plans are critical components to managing a highly motivated and skilled team.

Key points:
- Training - BIG motivator for IT staff
- Simple process:
  1. Define needs
  2. Determine priority of needs
  3. Identify if you need experts or depth
  4. Combine with individual desire and interest
- Develop individualized plans
- Incorporate into Performance Plans
- Don't forget yourself

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Training and the ability to learn about new technology is one of the best motivators an IT manager has. It consistently ranks high for the reason technology people remain with a company.

Developing your employees is an important part of building a highly productive and efficient team. You will be far more successful in this effort when you create an organizational training plan with individual employee training objectives.

**Training Plans**

**Training - BIG motivator for IT staff** - Training and educational opportunities consistently rank as one of the higher reasons people stay with a company. Be proactive and take advantage of a tool that will help you motivate staff and develop your team.

**Simple process:** - I use a simple process to build an organizational training plan.

1. **Define needs** - Quantify the skill gaps you have and additional depth needed in critical skill areas of your organization.

2. **Determine priority of needs** - From the list of needs, prioritize them based upon importance and expected value in assisting your team’s support requirements.

3. **Identify if you need experts or depth** - Determine if you need to develop "experts" or depth. Experts require more technical knowledge and may require longer time so you may consider filling your expert needs with a new hire versus training if a significant skill gap exists in your organization.

4. **Combine with individual desire and interest** - People are more aggressive and end up doing better work when it is something they have a genuine interest in. As much as possible, target educational plans with people that have an interest in the technical area you focus them on.

5. **Develop individualized plans** - Develop individual training and educational plans from your overall organizational training plan. Every employee education objectives each year that develops knowledge and professional expertise.

6. **Incorporate into Performance Plans** - Incorporate individual employee plans into their Performance Plan so it has focus and importance.

**Don’t forget yourself** - Don’t forget yourself when you are developing an organizational training plan. Your ability to learn from others will help you manage a more efficient technology organization that achieves more success.
16. Murphy’s Law

Description:
"If it can go wrong, it will go wrong." They must have coined this phrase with technology in mind.

Anticipating what can break, or go wrong, and it can help you position yourself to minimize the inevitable.

Remember, regardless of how stable your technology is, something can always disrupt your technology environment. Being prepared is knowing what can happen and having a plan to deal with it when it occurs.

Key points:
- "If it can go wrong, it will go wrong"
- Anticipate breakage and implement preventive action
- Define your recovery processes to deal with breakage
- Implement appropriate levels of prevention and response
  - Cost factors
  - Acceptable downtime factor
  - Alternative responses that make sense for "our company"

Category:
- IT Assessment
- IT Strategy & Planning [x]
- IT Project Management and Processes [x]
- IT Organization and Staff [x]
- IT Financial Management
- IT Measurements and Communication
Discussion:

"If it can go wrong, it will go wrong." Maybe that's all we need to say for this model. I'm sure you have probably experienced Murphy's Law in your travels.

Knowing that this principal actually happens can help you anticipate things that can go wrong and put into place preventive action. Awareness can also help you identify recovery processes you need to have when and if something goes wrong.

"If it can go wrong, it will go wrong" - Know that anything can and will go wrong, whether it's the most stable hardware system, the best change management process, or your most reliable employee. Things can happen to cause the most trustworthy element of your business to go haywire. Being aware of this fact is the first step in being prepared. No need to panic, but proper reflection on the matter can be a real benefit.

Anticipate breakage and implement preventive action - Anticipate where failure can happen and implement preventive measures in the places that make sense.

Define your recovery processes to deal with breakage - In critical business operation areas, be sure to define your recovery processes in the event of a failure. It will minimize the impact the failure has on the business and help you recover quicker. Going through this process may also help you define prevention elements.

Implement appropriate levels of prevention and response - Appropriate prevention is different from one company to another. Use the following criteria to determine what's appropriate for your company:

1. Cost factors - Do what you can afford and what is considered cost effective for your company. Every company's threshold for what is appropriate will be different.

2. Acceptable downtime factor - Acceptable downtime might be several hours, even a week. It might also mean that any downtime is totally unacceptable such as in air traffic control. Develop your company's acceptable downtime factor to determine the level of redundancy you need in your systems architecture and where it's needed.

3. Alternative responses that make sense for "our company" - Systems and process failures may have many work around solutions or optional responses. Evaluate the type of failures that pose considerable risk to your company and develop an appropriate response to the issue when and if it occurs.
17. Create Vision

Description:
Leaders define where they are going and communicate it to others. People follow leaders with vision of where they are headed and who know how they are going to get there.

Managers that articulate their vision are proactive and forward thinking versus reactive. They also achieve more success.

Key points:
- Define your goals and objectives
- Defining vision helps keep IT in sync with company needs
- Communicating vision exhibits leadership and people will follow

Category:
- IT Assessment
  - IT Strategy & Planning
    - IT Project Management and Processes
    - IT Organization and Staff
    - IT Financial Management
  - IT Measurements and Communication
Discussion:

No matter what level of responsibility you have as an IT manager or CIO, you need to create vision concerning your organization’s objectives. Defining a vision means you are moving the organization forward and willing to take charge of your destiny.

Senior management needs IT managers to communicate where they are headed. It creates a check and balance that helps keep your IT initiatives in sync with company needs. It also creates confidence for your employees as they see a sense of direction and commitment to the future.

Define your goals and objectives - Define your organization's objectives as clearly as possible and identify the priority of your IT initiatives. Stating what you plan to accomplish gives senior management the ability to validate the plan and shows you are committed to a plan.

In a small programming organization, your objectives may be to increase productivity or the quality of the new code implemented by your team. In a desktop support organization, the objectives may be to reduce the average time of resolving problems or to eliminate certain problems altogether. A CIO will have many more objectives. The point is that every IT manager should state his/her specific objectives in creating a vision for his/her organization.

Defining vision helps keep IT in sync with company needs - Quantifying your objectives allows senior management to validate and to endorse your vision. Working through this process will keep your efforts in sync with the company and insure your team’s efforts are adding value to the business.

Communicating vision exhibits leadership and people will follow - Managers that quantify their objectives and can communicate their vision to others exhibit strong leadership traits. Executives see maturity and forward thinking and someone who is proactive. Employees see a manager that takes charge and leads versus sitting idly by.

Managers who develop a vision of where they want to take the organization achieve more success.
18. Decision making

**Description:**
It's better to make the wrong decision at times than to make no decision at all. Managing is about assessing issues, evaluating alternatives and implications, and making the best decision for the circumstance.

Be proactive in making even the tough decisions after you have the information needed and teach others by your example that you are prepared to make decisions and move forward.

**Key points:**
- Better to make a wrong decision than none at all
- Weigh risks and choose best alternatives
- Escalate and seek more insight if the risk is high
- Communicate the decision
- Anticipate the cause and effect and plan for the impact

**Category:**
- IT Assessment
  - IT Strategy & Planning  **x**
  - IT Project Management and Processes  **x**
- IT Organization and Staff  **x**
- IT Financial Management  **x**
  - IT Measurements and Communication
Discussion:

Filling a leadership position in a company means we have to make decisions, sometimes very difficult decisions. Our ability to evaluate an issue and be decisive in making tough decisions instills confidence among those around us.

Employees are watching to see if we will step up to tough issues and how decisive we will be in dealing with them. Our decisions will likewise be scrutinized by others and will set an example for how we go about managing our operation.

**Better to make a wrong decision than none at all** - Failing to decide on a point is actually making a "no decision". In my mind, part of our job as managers is to move things that are gray or ambiguous to a point of clarity or more "black and white" so that we can make a decision on the issue. I believe that it is usually better to make a wrong decision than no decision at all, provided it does not create a catastrophic situation.

We can always fix a problem, and the benefit of making a decision on an issue is that we create the opportunity to move forward.

**Weigh risks and choose best alternatives** - Evaluate your alternatives and weigh the inherent risks and the cause effect of your potential decision. Making the decision is important, but you still need to do so with appropriate knowledge.

**Escalate and seek more insight if the risk is high** - When the possible risks are high, seek counsel from others with more experience or insight who can help you evaluate the situation. It might be Human Resources, legal, or senior operational manager who can help.

**Communicate the decision** - Announce your decision as appropriate for the situation. Don't fanfare issues that should not be highly publicized, but keep those who have a vested interest in your decision aware of your planned action.

**Anticipate the cause and effect and plan for the impact** - Every action has a reaction. Take time to evaluate the cause and effect of your decisions and plan for the impact accordingly. One of the best ways to be prepared is to anticipate issues before they happen.
19. Ready - Aim - Fire

Description:
Clearly identify your target, develop a plan of attack, and finally implement your solution. There is a real benefit by evaluating a situation and taking the time to prepare your strategy before "pulling the trigger". At the same time, "analysis paralysis" can be just as bad as firing too quickly.

Manage in a Ready - Aim - Fire mode and you will suffer fewer "casualties" and achieve many more successes.

Key points:
- "Shooting from the hip" creates breakage
- The basics
  - Ready - Quantify and understand your objectives
  - Aim - Clearly define your plan
  - Fire - After evaluating consequences, implement with vigor
- Lead by example and coach others to follow this process

Category:
  IT Assessment
  IT Strategy & Planning
  IT Project Management and Processes
  IT Organization and Staff
  IT Financial Management
  IT Measurements and Communication
Discussion:

When you prepare to make a decision or take action on something, use a "ready - aim - fire" approach to save yourself from a lot of pain and aggravation.

There may be situations where you have to react so quickly that you don't have time to prepare and take aim at what you're "shooting at", but those scenarios are rare.

Create an environment where your organization's actions are planned by establishing processes to support a more predictable approach than a "knee jerk" reaction.

"Shooting from the hip" creates breakage - When managers don't take time to prepare and clearly define their targets, they accomplish less and often break things which has even more negative impact on the team's productivity. It also damages client satisfaction.

The basics - Use a simple approach as follows:
- **Ready** - Define and understand your objectives
- **Aim** - Clearly define your plan
- **Fire** - After evaluating consequences, implement with vigor

Lead by example and coach others to follow this process - Managers who use a "ready-aim-fire" approach are teaching their employees by example the proper way to address issues that come up. Anyone can shoot blindly when a problem arises in trying to resolve the problem, but the person who identifies the problem or issue, looks at the options available to solve the issue, and assesses the implications before "pulling the trigger" will get much more accomplished than the "hip shooters".

When you have "quick fire" artists in your organization, reach out and help them understand the issues they create by reacting to issues before they have the facts and have analyzed the ramifications of their actions. You will be helping your team achieve more success as well as developing your employee to be more successful.
20. Target your efforts

Description:
Be as specific as you can be as to what you want to accomplish, how you will achieve it, and the results you expect to attain.

Issues and needs lead to opportunities. The manager who can target specific IT initiatives and projects to address key needs of the company are valuable resources.

Key points:
- Target specific initiatives
- Prioritize based on need and opportunity value
- Gain agreement with your plan
- Execute and follow-up well
- Revise your priorities as needed

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

When managing any type of IT organization, you want to be as precise as possible in what your team focuses on. Targeted initiatives that do the most good and add real value for the company are vital issues in performing successfully in an IT manager role.

Targeting your team's efforts means you take proactive action versus allowing yourself to remain reactive. The nature of much of our IT business is to deal with problems that result in the use and changes in technology. However, we can also place focused attention on areas that reduce or eliminate much of the reactive nature of our business.

**Target specific initiatives** - Identify exactly what you need to accomplish and assign responsibilities accordingly to make it happen. This requires you to plan, gain agreement that your plan is in sync with the company's needs, and to focus resources on specific projects and initiatives.

**Prioritize based on need and opportunity value** - Your company's needs and issues should drive your technology priorities. Regardless if it is refining a support process or tackling a large project, the answer to whether such an initiative should be a priority lies within your customer (users and internal/external clients). If it's not something that supports your client's priority. It shouldn't be your priority.

**Gain agreement with your plan** - After you plan your priorities, gain agreement from stakeholders of the company prior to focusing your resources on these initiatives. This will keep you in sync with client needs and priorities and help your team achieve more success for the company.

**Execute and follow-up well** - Once the plans are committed to, execute your initiatives and follow-up well to achieve the success you have identified to be accomplished by these initiatives.

**Revise your priorities as needed** - Business factors change. When they do, be flexible enough to change your priorities if they need to be changed. Don't try to stay in the "buggy whip" business if horse drawn carriages are becoming obsolete. What was a good decision and appropriate focus a year ago may be completely irrelevant today, especially in light of the pace at which technology is changing.
21. Pressure points

**Description:**
Pressure points apply to almost every situation. Companies and industries have pressure points, or leverage opportunities. Projects have pressure points that tend to make them successful or not. People and clients have needs and "hot buttons" that can be significant elements in managing them effectively.

Know where the pressure points are in any given situation and you position yourself for success in dealing with the situation.

**Key points:**
- Every industry and company has leverage areas (pressure points)
- Clients have key needs and "hot button" issues
- Employees have individual needs and wants
- Projects have critical points that lead to success or failure
- Manage to the pressure points in any situation

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
  - IT Measurements and Communication
Discussion:

IT managers who know how to find the "pressure points" of a situation have an edge over those who don't or that do not understand this concept.

Most things we deal with have "pressure points", "hot buttons", or leverage points. Call them what you want, finding these points can position you to be a much more effective manager.

Every industry and company has leverage areas (pressure points) - Industries and companies have areas that can be leveraged by technology. Leverage to a CEO or CFO usually means reducing cost or gaining a competitive edge for the company. For example, in healthcare it's all about coding services appropriately and effective billing and collections. In retail it's about sales analysis and improving inventory turns of merchandise.

Learning your industry’s drivers or leverage points will help you identify technology initiatives that have major impact in the business and that appeal to your executive team.

Clients have key needs and "hot button" issues - Your customer, whether that happens to be an external client or an internal user, has key needs. For example, the Human Resources Department of your company has specific issues where technology can benefit the employees of the department and help them achieve their mission within the company better. It might be in providing an easier and more cost effective way of producing a weekly newsletter, managing tons of paper, or staying attuned to changes taking place within the HR community. The point is that every client has very specific points of leverage where technology can be of benefit.

Employees have individual needs and wants - Likewise, employees have specific "hot buttons" that are important for an IT manager to be aware of. These individual needs are motivators waiting for you to tap into as you go about helping your employees be more productive and more focused to achieve more success.

Projects have critical points that lead to success or failure - Projects also have "pressure points" or critical points that will make or break the project. Quite often, these are bottlenecks or critical milestones that have a determining factor on a project’s success.

Manage to the pressure points in any situation - Managers who identify where the "pressure points" are and can manage to them will achieve more success.
22. Strategy basics

Description:
Developing a technology strategy for your department or for the entire IT organization need not be complex or difficult. Use a basic approach in developing your strategy and you separate yourself from your peers plus begin managing in a much more proactive manner.

Key points:
- Developing strategy exhibits maturity
- Use a simple process
  - Define needs and "where you want to be"
  - Identify technology issues
  - Develop IT initiatives from the needs and issues list
  - Prioritize your initiatives for business value
  - Gain agreement
  - Plan and execute your prioritized initiatives
- Strategies can be developed for staffing, staff development, software development, IT services, and almost any area of need

Category:
- IT Assessment
- **IT Strategy & Planning**
  - IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Developing a strategy for your IT operation need not be overly complex or difficult. Having a strategy in place is an important issue and a step that can separate you from your peers. Working a strategy makes you more proactive than the managers who prefer to react and "go with the flow".

Most managers do not develop strategies unless required to do so by their manager. It's simply easier to react than to set aside the time to define a strategy and to go through the effort of getting it approved by senior management. Most of us are content in letting the issues of the day fill our time.

Developing strategy exhibits maturity - Managers who develop strategies are in the minority. This proactive effort exhibits maturity and the desire to make a difference. Companies need IT managers who can identify issues and needs and translate them into meaningful strategies to improve things.

Use a simple process:
1. Define needs and "where you want to be" - Determine your client's needs, goals and objectives plus define the improvements you need to make in your IT organization.
2. Identify technology issues - List all the issues that have technology implications for your area of responsibility.
3. Develop IT initiatives from the needs and issues list - Develop a set of initiatives that address the issues and needs you have defined.
4. Prioritize your initiatives for business value - Prioritize your initiatives based on what provides your company the greatest value or that positions you to do more later. This step will always vary depending upon current issues and needs of your company.
5. Gain agreement - Before you start implementing, be sure to gain agreement and commitment from senior management. This will keep you in sync with their needs and help you be more successful.
6. Plan and execute your prioritized initiatives - Plan each of the projects required to complete a technology initiative and execute them well; after all, your reputation for success will be based upon whether or not you are able to deliver.

Strategies can be developed for almost any area of need - Effective managers build strategies for virtually every situation. It might be an organizational plan, a strategy for hiring the most effective employee, how to build higher quality software, or how to deliver more responsive support services. Use the simple process in this model to help you build strategies that improve your situation.
23. Bite the head of a frog

Description:
Tough issues and decisions often get put off until a "better time" to deal with them. When you have a painful or difficult issue to deal with, make it a point to go into the office and deal with the issue early or at a specific time, i.e., do the distasteful deed proactively and get it out of the way. You will find that it's less stressful for you and has a positive impact on your productivity as you won't be worried about the issue all day.

Take care of your most "distasteful" issue first and it clears the way for a better day.

Key points:
- Deal with the "ugly" issues early and avoid procrastination
- Address tough issues early in the day
- Evaluate consequences and prepare for the impact
- Plan for the event and get your act together
- Approach the issue with a win-win perspective

Category:
IT Assessment
IT Strategy & Planning
x IT Project Management and Processes
x IT Organization and Staff
IT Financial Management
IT Measurements and Communication
Discussion:

Bite the Head of a Frog

Most of us have this thing called a "procrastination factor". When we have a tough issue to deal with, we often put it off until the very last possible moment. This burns up a tremendous amount of energy, creates a lot of stress, and lowers our productivity quite a bit because we can't stop thinking about the tough session we are about to have when we finally deal with our tough issue. There is a solution. Take care of your ugliest situation first thing in the day and get it out of the way.

Deal with the "ugly" issues early and avoid procrastination - Once you are prepared, tackle your toughest issues early and avoid procrastinating. Putting it off doesn't do anything but build up anxiety and cause you to lose focus on important issues of the day so handle the problem and move on.

Address tough issues early in the day - Handling your toughest issues first thing will make you feel better that day. Think of it as "biting the head of the frog" being the worst thing you have to do that day. Go ahead, do it, and get past it so you can be productive the rest of the day.

Evaluate consequences and prepare for the impact - Once you determine how you need to handle a tough issues, it's best to go ahead and handle it. Be sure to evaluate the downside and possible ramifications so you go in prepared. In many cases, the toughest part is the anxiety that builds leading up to when you actually deal with the issue. If you have prepared well, handling the issue won't be as tough as you think.

Plan for the event and get your act together - Do whatever it takes to prepare. Seek help from those with experience in such matters and develop a planned approach. If it's a really tough employee or client issue, it's worth the time to prepare.

Approach the issue with a win-win perspective - Approach tough situations with a win-win attitude and seek a way for both you and the other party to find something positive with your solution. For example, if I have to fire someone for consistent unacceptable performance, I approach the issue in the perspective that I'm helping the employee move on to another career opportunity where he/she will be successful. It's unfair for the company, my team, myself, and especially the employee to allow him/her to continue working when he/she is not going to be successful.
24. Drain the swamp

Description:
All too often an IT organization finds itself so busy with the hot issues of the day or week that they don't make a lot of progress. In other words, they are so busy fighting alligators that they forget to drain the swamp which will eliminate the alligator issue altogether.

Pull yourself back away from the chaos from time to time to evaluate whether there are things you can do to eliminate the source of your technology support problems and find a way to attack the issue, not the symptom.

Key points:
- Reactive managers get lost in the shuffle of supporting technology
- Clearly define your objectives
- Always seek the source of problems and attack them aggressively
- Find ways to execute your plan, even when you have to fight an alligator
- Fight the alligators only as needed to continue moving forward
- Stop fighting the alligators and drain the swamp

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

I hear it all the time, "I'm too busy to take a few days off to attend that training program I know I need." When I hear things like that, I have to chuckle inside. That's the reason the people are in such a reactive mode; they don't take the time to learn how to get out of it so they try to work harder.

Stop fighting the alligators and drain the swamp. Eliminate the source of the problem and you eliminate the mundane issue that causes you to lose productivity and be ineffective. "Fighting alligators" is the wrong focus.

Reactive managers get lost in the shuffle of supporting technology - Most of us tend to react because it's easier than being proactive planners. Reactive managers get lost and stay lost in the day to day support issues. The issues of the day tends to fill these managers and their team's productive hours and as a result they don't make very much real progress.

Clearly define your objectives - Define your objectives and target your efforts for higher achievement. Take charge of your life and what you want to accomplish.

Always seek the source of problems and attack them aggressively - Learn where the source of your problems are and attack them with vigor. Eliminating the source can be a real boost to your team's productivity and remove a lot of headache for your client. This can improve client satisfaction significantly.

Find ways to execute your plan, even when you have to fight an alligator - You may have to fight some issues while trying to eliminate the source of the problem, i.e., "fight an alligator in the midst of draining the swamp". If so, always try to find a way to work toward achieving the real objective while dealing with the immediate problem.

Fight the alligators only as needed to continue moving forward - Totally avoid dealing with the problem if you can while you focus your effort on eliminating the problem source. If you have to fight alligators, only fight them to the extent required to get by while you deal with the real problem. Remember, the alligator is not the problem; it's the swamp, so focus attention on the real issue.

Stop fighting the alligators and drain the swamp - Focus on eliminating the source of problems versus fighting the problems and you will find your team will be much more productive and will achieve more. Your team will also appreciate your wisdom on such matters.
25. Lines of fire

Description:
Clearly define your staff’s responsibilities to get the most from their performance. Cover technology support needs and issues with specific responsibilities, develop the skills of your employees, and implement processes that help them succeed.

Establishing clear responsibilities for each employee creates confidence, builds teamwork, and provides maximum coverage in supporting your company's business needs.

Key points:
- Clearly define responsibilities and range of focus
- Train to be effective in handling assigned responsibility
- Cover the field of fire (company's technology support issues and needs)
- Identify backup and escalation contingencies
- Inspect for coverage

Category:
IT Assessment
IT Strategy & Planning
IT Project Management and Processes
IT Organization and Staff
IT Financial Management
IT Measurements and Communication
Discussion:

In a Marine Corps fire fight team, they teach you to set up "lines of fire". This is depicted in the model and it represents a specified area of fire coverage for each Marine rifleman so that the firepower of a small group of men is maximized to the fullest.

In an IT organization, we often see people running all over the place trying to do many things to support their client, but essentially being ineffective because they are not focused to provide a high level of support.

"Lines of fire" represents an approach where you focus each team member on specific areas of coverage (responsibility) to maximize the output of the team.

Clearly define responsibilities and range of focus - People need designated responsibilities and knowledge of how to handle them. Your job as manager is to focus each person on specific areas of support that maximize the team's effectiveness in supporting your business.

Train to be effective in handling assigned responsibility - Train your employees and make an investment in helping them be successful as individuals. When individuals are successful collectively in their assigned responsibility, the team is successful.

Cover the field of fire (company's technology support issues and needs) - It is your job as manager to determine the most effective way to cover your support requirements. If individuals perform as requested and the team fails, we have a management problem, not an employee problem. Our job is to determine what the support needs and issues are, to build an appropriate team, and to focus each employee on the area of responsibility he needs to handle for the team to succeed.

Identify backup and escalation contingencies - Build in backup, escalation, and contingency steps. Ultimately, there will be a breakdown in your team and you need to be able to fill the gap quickly and with minimal disruption.

Inspect for coverage - Once people are working in their assigned positions, inspect to insure you have all the gaps filled, people are trained to be effective in their assignments, and whether you need to make adjustments to achieve more.
26. Snails crawl; birds fly

Description:
Your employees, clients, and technology users are all different. Some can work at a very fast pace while others need more time to deal with change. Effective IT managers are able to develop plans, assign responsibilities, and deal with people in individualized ways to be successful.

Expect more from those who can do more and develop your "slower performers" to be able to do more.

Key points:
- People are all different
  - IT staff
  - Clients
  - Users
  - Managers
- Match responsibility with capability
- Communicate at the appropriate level
- Management approaches should reflect individual needs

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

When dealing with people, it is important to realize that they are all different. What motivates one person doesn't necessarily motivate another. One person might be able to do twice the work as someone else with ease. We are all different.

In managing employees or dealing with clients and users, you need to adapt your methods to the particular individual. Understanding that people have different capabilities and strengths as well as different "motivators" can help you manage them for higher levels of success.

People are all different - Learn the key motivators of people you come into contact with and you have a better opportunity of managing them.

1. IT staff - You have a responsibility to learn what motivates each of your employees and the levels of their capabilities to help them contribute as much as they possibly can to the success of your team and company. Expect more of your "superstars" because they can do more and should have responsibilities that reflect this. Develop weaker performers so they can contribute more in the future.

2. Clients - Your clients have different issues and perspectives about what your priority needs to be. All priorities can't be your top priority. Understanding your client's needs and sense of priority will help you manage his expectations and maintain a high level of client satisfaction.

3. Users - Users can have different values of what's important and what they expect from IT. Be consistent and manage their expectations so they realize and appreciate your IT support organization's role within the company.

4. Managers - Managers will manage differently and develop completely different strategies to meet the needs of a company. You know what? It's totally all right. Know that managers who report to you or that you work with will have different ideas. Learn from them as much as they learn from you.

Give people flexibility to be different and manage in a way that takes advantage of their strengths and minimizes the impact of their weaknesses.

Match responsibility with capability - Give strong employees more responsibility and expect more of them while developing your weaker employees to be able to do more.

Communicate at the appropriate level - Discuss issues with people that are appropriate for their level of understanding, responsibility, and capability.

Management approaches should reflect individual needs - People have individual needs and wants. Learn what they are and manage in a way that addresses them.
27. 2 birds with 1 stone

**Description:**
Leverage opportunities abound in our IT management roles. Fill multiple needs with one new hire, solve multiple programming issues with one programming enhancement project, or tackle multiple objectives with one project.

Always be on the lookout for opportunities to attain multiple benefits or objectives with one focused effort.

**Key points:**
- Multiple issues can be addressed with a single event
  - Programming enhancements
  - Hiring new staff
  - IT initiatives or projects
- Always look for multiple opportunities that can be attained with a single effort

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

2 Birds with 1 Stone

Anytime you can take care of multiple issues with one action you want to do it. In our technology management world, we have many opportunities to "double up".

Although there are many situations where you can leverage by addressing multiple issues with a single act, you have to look for them. Make it a part of your management style to look for these opportunities all the time and take advantage of the possibilities.

Multiple issues can be addressed with a single event - Many issues offer leverage in technology. Here are just a few:

1. Programming enhancements - When working on a program to address an enhancement or user request, combine other requests that involve the same program. Your programmer time will be leveraged and you will provide more output for your requestors.

2. Hiring new staff - I always try to fill multiple skills and traits I've identified as a need for my IT organization when hiring a new employee.

3. IT initiatives or projects - Multiple business issues or needs can often be addressed with a single initiative or project. Take advantage of these opportunities whenever you can.

Always look for multiple opportunities that can be attained with a single effort - I make it a priority to look for "two birds with 1 stone" opportunities just like I seek cost saving opportunities for my company. Finding situations that can be leveraged benefits your team as well as the company so make it part of your culture within your IT organization to find these opportunities.

Coach your employees to look for leverage opportunities where they can address multiple issues with a single action.

One example I use quite a bit is when I develop employee performance plans. If I have twenty programmers, I start by developing a "standard" programmer performance plan. Then, I customize the standard for each employee by modifying the content and placing weight on issues that are specific for each employee. It saves me hours of time and gives each employee a unique plan that's tailored to his or her needs.
28. Bottlenecks

**Description:**
Identifying and eliminating project bottlenecks is a key factor in completing a project successfully.

A Project Manager should constantly look for potential bottlenecks in a project and to take immediate action to reduce their impact or eliminate them altogether.

Eliminating bottlenecks can help you improve the completion of a project and reduce cost. Gaining a "sixth sense" in being able to identify bottlenecks can make a huge difference in your success.

**Key points:**
- Bottlenecks are the "breakers" of projects
- A key focus for any Project Manager is to identify and eliminate bottlenecks
- Eliminating a bottleneck can create more bottlenecks
- Anticipate and look for project and business bottlenecks

**Category:**
- IT Assessment
- IT Strategy & Planning
- **x** IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Bottlenecks are the limiting constraints of a project. In any project there will be one or more bottlenecks that can prevent you from completing the project successfully. It might be getting the resource you need, it may be failing to complete a critical task on time, or any number of other issues.

One of the important responsibilities of a project manager is to identify the bottlenecks of the project and to figure out how to eliminate them or minimize their impact.

**Bottlenecks are the "breakers" of projects** - Bottlenecks exist in every project and are just waiting to spoil your successful completion of the project.

**A key focus for any Project Manager is to identify and eliminate bottlenecks** - A strong project manager understands the relevance that bottlenecks have in regard to project success. Because of that, successful project managers work diligently to determine where the bottlenecks are and how to address them early on.

**Eliminating a bottleneck can create more bottlenecks** - When you eliminate a bottleneck it may create one or more new bottlenecks, usually further down the project timeline. Be aware of this fact because you will need to "seek and destroy" any new bottlenecks that occur.

**Eliminating a bottleneck can have big benefits** - When you eliminate a bottleneck, it often frees up time within your project and can actually build in time buffer for other tasks of your project. Keeping your project on time or possibly improving the time schedule can reduce the cost of the project and positions the company to reap the benefits of the project sooner.

When I build a project plan, I schedule the tasks conservatively to help insure we can complete them on time. Finding the bottleneck that positions us to complete the project ahead of schedule is a huge benefit when it occurs.

**Anticipate and look for project and business bottlenecks** - Make it your business to find the bottlenecks in your projects or business environment. Anticipate where they can occur and do what you can to detect them early and to eliminate them once discovered.
29. The main thing is not to get excited

**Description:**
Our role as an IT manager is to defuse anxiety and issues that create frustration and ill will. To do this, our approach should be such that we have a calming effect when handling problem situations.

Staying calm under pressure is an important trait to have and can be very helpful to those around you in tough situations.

Even if you aren't calm on the inside, maintaining a cool and composed demeanor will put the power on your side.

**Key points:**
- IT manager role is to defuse issues that cause concern
- Your demeanor will either escalate an issue or have a calming effect
- There is no issue that cannot be solved or worked around

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

The Main Thing is Not to Get Excited

Staying cool under difficult circumstances is not easy, but important nonetheless. Your ability to create a calming effect versus escalating the issue can be a tremendous asset throughout your career.

One of the secrets to "not getting excited" is to refuse to take obstacles or irate comments from others personally. It is when you take these issues personally when you stop handling them objectively. Emotional reaction only makes the situation worse.

IT manager role is to defuse issues that cause concern - One of our management responsibilities is to help resolve problems. To do so, we need to "defuse" difficult situations rather than "stir them up". People can get very intense about their technology issues and be short tempered when it comes to getting those issues resolved. Our management approach and that of our employees in supporting these situations must have a calming effect.

One way to have such a calming effective is to listen intently, try to avoid confrontational situations by being attentive and responsive to client/user needs, and by keeping them aware of the status of the situation frequently. Communication is one of your best tools in calming a difficult situation. This applies to employee situations as well.

Your demeanor will either escalate an issue or have a calming effect - Your demeanor and how you approach a situation will either calm the situation or escalate it to something worse. Get confrontational and it may escalate out of control and do irreparable damage. Stay calm yourself, be objective and not emotional, and deal with the tough issue in a way that both parties can win. Deal with the issue, not the emotion.

Your employees are looking for your lead and support. Be aware that other eyes are watching how you approach the situation to defuse the issue and your action sets an example for others to follow.

There is no issue that cannot be solved or worked around - When you approach any situation, it helps knowing that there is always going to be a reasonable solution to the problem. Every issue can have a positive outcome, even under the most dire circumstances. The key is to approach the issue with that in mind and look for the solution that can benefit both parties, even if just a little.
30. Invest in yourself

**Description:**
We should all continue to learn and grow. Don’t forget to make an investment in your own personal and professional growth. To do this, make a deliberate effort to focus a development program for yourself just as you do for your employees.

Remember, much of your team's performance and productivity depends upon your management insight and ability. Investing in yourself will help you develop a stronger team that is much more effective for your company.

It's a win-win-win proposition so take it.

**Key points:**
- Continue to learn and grow
- Key investments can shorten your learning curve
- Learn from other's experience to improve your effectiveness
- Develop a formal education program for yourself

**Category:**
- IT Assessment
  - IT Strategy & Planning
    - IT Project Management and Processes
  - IT Organization and Staff
    - IT Financial Management
    - IT Measurements and Communication
Discussion:

Too often, a manager works diligently to see that members of his/her team are properly trained and provided the best tools to do their job, but forget about developing possibly one of the most important resources on the team - yourself.

Make a commitment to invest in yourself. The more you know and learn, the more prepared you are to develop your staff and in the most cost effective manner. Improve your own productivity and knowledge and you will have a more significant impact on your team's achievement.

Continue to learn and grow - Make it your mission to continue to learn and grow. Learn from those who have more experience and have established a track record of success. Read, attend classes, be part of professional organizations, and network with others in your skill area. These relationships and activities will be beneficial now in helping you learn and may become invaluable contacts later on in your career.

Key investments can shorten your learning curve - Learning how to do something from someone who has already experienced the issue can shorten your learning curve and reduce the potential pain you might incur in dealing with the issue for the first time. Take advantage of every opportunity you can to learn from others.

Learn from other's experience to improve your effectiveness - Look to those who are effective in what they do and learn how and why they are so effective. Pull the good parts and incorporate them into your management style.

One of the best pieces of advice I've ever had was, "Mike, take the best of each of these people and incorporate into your own management style. It will help you become a stronger manager."

Develop a formal education program for yourself - Mapping out an educational plan to develop an employee's networking skills is no different than mapping out a program to develop your own IT management skills, but most don't. They wait for someone to do that for them.

Be proactive in this effort and line up a specific program each year to develop your own management skills and knowledge. It will make you much more effective, improve your management productivity, and make the job many times more enjoyable.

Knowledge is power and when you have the insight and tools to do the job, it puts you into the power position that allows you to control your own destiny more than ever before.
31. Net it out

Description: 
Most of us in technology tend to be detail oriented. Because of that, we can often provide more information than what others really need or want to hear. This "overdose" of information can actually alienate others from us and create client satisfaction issues.

When communicating with various groups or individuals, keep your discussions focused and to the point, or "net". This is especially important when dealing with managers and executives of the company.

You will find yourself more productive and that people will listen closer when you have something to say.

Key points: 
• When communicating, keep it "net"
• Executives need high level, not details
• Communicate the pertinent issues and be prepared to discuss the detail
• Coach employees on keeping their conversations "net"

Category: 
IT Assessment
IT Strategy & Planning
x IT Project Management and Processes
IT Organization and Staff
IT Financial Management
x IT Measurements and Communication
Discussion:

When I ask a question as a senior executive (CIO), I generally want a short "yes" or "no" answer and not the details of how a fine Swiss watch works. Technology people are detail oriented and tend to want to give you all the details so you "understand".

Learn how to "net it out" and get to the point quickly in a conversation. This is especially true when dealing with senior executives and clients. They simply do not want nor need all the detail.

When communicating, keep it "net" - Keep your conversations "net" and you will find people will ask your opinion and insight on things more often. Sound crazy? Well, it's not. When you are asked about the status of a project and you reply with seventeen paragraphs of detail, people will stop asking you about it. Tell them it is on target, or not, and limit it to that. Let the other person lead the conversation to the level of detail they want to hear; don't force the detail on them.

Keep your conversation "net" and to the point in short "A,,B,,C" bullet points that provide enough information but not too much.

Executives need high level, not details - Executives deal with hundreds of issues. If they are like me, their brain cells will only hold so much. "Net out" your discussion and keep it to the point and include only the important issues; they will appreciate you for it.

Communicate the pertinent issues and be prepared to discuss the detail - When you point out the key issues, be prepared to discuss all in more detail. Sometimes, the executive or client is genuinely interested in the detail and needs to know more about the issue to feel comfortable. Keeping your conversation "net" does not mean you shouldn't understand the detail and be prepared to discuss it. There will be times when you will need to discuss the details.

Coach employees on keeping their conversations "net" - Coach your employees to keep their conversations "net" as well and why it is important. Develop your organization to be thorough but concise and "net" in all their communications, both verbal and written. It is a skill that marks a professional.
32. In sync

Description:
Keeping IT aligned with the business is an ongoing requirement for any IT manager. If your organization is not in sync with your company's needs, it is your responsibility to get it in sync, even when the company does a poor job of defining its goals and objectives.

Key points:
- IT strategy alignment with the business is critical
- Follow a simple process
  - Assess company needs and issues
  - Develop and prioritize IT initiatives to meet these issues
  - Verify your plans with appropriate management team
  - Review progress and validate your focus continues to be "in sync"
- IT has the obligation to stay aligned with the business

Category:
- IT Assessment
- IT Strategy & Planning
  - IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Keeping your IT operation "in sync" or aligned with the business is critical. It is our responsibility to stay aligned with the business, not the businesses' responsibility to remain aligned with information technology.

Even if the company lacks a strategic plan and appears to have no specific idea of where it is headed, our responsibility is to help develop that strategy so we can align our technology initiatives in such a way to support that business need.

IT strategy alignment with the business is critical - Failure to keep your IT operation in sync with your company's needs will waste limited dollars and miss the mark. This is when you hear things like, "IT has it's own agenda.", "We don't understand why IT is spending so much money.", and other similar remarks.

Follow a simple process - Keeping your technology in sync with your company is not all that difficult. The problem often occurs when a strong technologist becomes a manager and thinks he needs to do something to help the company. Part of this is accurate, but you should only do something when you know it will provide real value to the company and support its mission. Follow a simple process to keep your organization aligned with company needs:

1. Assess company needs and issues - Conduct a technology assessment to determine what the company needs and what the issues are that relate to technology. This is what you need to focus on, not what you think is the issue.
2. Develop and prioritize IT initiatives to meet these issues - From the list of issues and needs, develop your list of IT initiatives and projects that will address them. From this list, prioritize to meet need, reduce risk, or achieve value.
3. Verify your plans with appropriate management team - Present your plan and verify with senior management that it is appropriate. Once they agree and commit to the plan, and only then, should you begin implementing your strategy. To start before you have "buy in" has risk of doing things that they deem inappropriate or unnecessary.
4. Review progress and validate your focus continues to be "in sync" - Once you start implementing the plan, inspect often and review progress with your executive team to ensure it is still what needs to be done. Business issues change and therefore strategies need to change. Your technology strategy must be somewhat flexible and be able to adapt to the company's needs as it needs to change to meet changes in the business climate.

IT has the obligation to stay aligned with the business - We must align technology strategies to the business, not the other way around. There is no justification in expecting the company to simply support what we want to do based on what we think is important.
33. Management Basics (AQPPI)

Description:
Managing a IT organization can be complex and challenging. Effective managers learn the fundamentals that lead to success.

Follow a simple process to manage your IT operation.

Key points:
- Follow a simple process to manage your IT operation
  - Assess needs
  - Quantify needs and issues
  - Define and prioritize IT initiatives and projects
  - Plan your priorities and gain agreement
  - Implement your initiatives once approved
- Follow the fundamentals to stay aligned with business need

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Managing an IT organization is a complex and difficult mission, but it can be simplified in many respects. There are a few basics that you can follow that will help you manage the operation and keep your efforts in sync with company needs.

Use this model as a simple guide in managing any situation. The principles work whether you are dealing with a difficult employee situation, assuming responsibility for an entire IT organization as a new CIO, etc.

Follow a simple process to manage your IT operation

1. **Assess needs** - Determine what the needs are from the senior "stakeholders". Their opinions and answers are what is most needed, not speculation from a technology perspective. Your senior management team or client may not be able to tell you specific technology solutions that are needed. Your job is to develop an understanding of the business need and translate that need into technology solutions that truly address the need and add value.

2. **Quantify needs and issues** - From your assessment interviews, quantify all the issues and needs that are discussed.

3. **Define and prioritize IT initiatives and projects** - From your needs and issues list, define the technology initiatives and projects that will address them. An initiative may have many projects. A project may address many issues. Prioritize your technology initiatives based upon balancing need, risk, opportunity, and cost to help the company the most.

4. **Plan your priorities and gain agreement** - Document and present your plan and gain agreement and commitment from all you believe are necessary to "buy in" to your proposed approach.

5. **Implement your initiatives once approved** - Plan each project and implement it successfully. The successful implementation of projects is what establishes your track record of success and one who delivers on what you say you will.

Follow the fundamentals to stay aligned with business need - Follow these fundamental management steps and you will manage to keep IT aligned with business needs, which is one of the most important things for a technology manager or executive to do.

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**Discussion:**

<table>
<thead>
<tr>
<th>Management Basics</th>
<th>Assess</th>
<th>Quantify</th>
<th>Prioritize</th>
<th>Plan</th>
<th>Implement</th>
</tr>
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**Follow a simple process to manage your IT operation**

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Follow the fundamentals to stay aligned with business need - Follow these fundamental management steps and you will manage to keep IT aligned with business needs, which is one of the most important things for a technology manager or executive to do.
34. Do the right thing

Description:
It is usually more important to do the right thing versus doing things right. In a pure world, we do the right things plus do them right, but often we don't have a pure world to operate in.

Peers, clients, and employees judge managers by the decisions they make. Don't fall into the trap of doing wrong things just to do something right. It can be costly in many ways.

Key points:
- Do what is right; it pays off in the long run
- What goes around, comes around
- Doing things right can be expensive and unproductive at times

Category:
- IT Assessment
  - IT Strategy & Planning
  - IT Project Management and Processes
  - IT Organization and Staff
    - IT Financial Management
    - IT Measurements and Communication
Discussion:

Do the Right Thing

Do right things over do things right

It is more important to do the right thing over always doing things right. You would like to think that you can do both but often it is simply not possible.

Doing something right might be the most cost effective approach to handling a situation, but it may not be the right thing to do. For example, when our company acquired other companies, I could have eliminated redundant employees from the acquired company faster and saved the company thousands of dollars, but we felt it was not the right way to handle such situations. As a result, we implemented steps to help those employees transition to other positions within the company or to other companies altogether. It wasn't the cheapest solution, but I can tell you that it benefited our company in doing the "right thing".

Do what is right; it pays off in the long run - Doing the right thing may not seem the best approach initially, but in the long run it pays off. Take the example above when we staged employee terminations due to having redundant staff after acquiring another company. Many of the benefits came from within our own company by the positive perspective our employees gained by our professional approach toward eliminating people who had nothing to do with the circumstance other than they were with a company that was acquired.

After all is said and done and you look yourself in the mirror in the mornings, doing the right thing makes you feel good about who you are.

What goes around, comes around - Treat people badly and ultimately you will be treated badly. It doesn't matter if it is your employee, a client, or someone you know outside of the office. You tend to get back what you give out so approach business and life by doing the right thing.

Your employees are watching your actions as a manager and also how the company deals with various issues. Set the proper tone by doing the right things over doing things right.

Doing things right can be expensive and unproductive at times - Doing the right thing can be a difficult decision for your company, especially when viewed in a dollars and sense perspective. The intangible benefits are much harder to see, but can be a significant benefit to your company.
35. Win-Win

Description:
We should always seek to resolve issues or find opportunities that allow all parties concerned to have a "win". Dealing with client satisfaction issues, even difficult employee situations, are usually more effective when both sides can find even a small win in the way issues are handled.

"Win-win" scenarios build stronger relationships and you never know how important a relationship might become one day.

Key points:
- Always seek a "win" for both parties
- When both parties win, a stronger bond is built
- If it is not a win for the other party, sooner or later the relationship ends

Category:
- IT Assessment
- × IT Strategy & Planning
- × IT Project Management and Processes
- × IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

In negotiation techniques, they teach you to find a way to arrive at a "win-win" solution. When both parties can walk away from the table with the feeling they have won, it is not only good for the deal at hand but also good for the relationship. The relationship can be much more important than winning the negotiation itself in the long run.

This principle applies to our IT management roles quite a bit. We are always having to negotiate, arrive at compromise, or to coach others as we go about our daily responsibility. Seeking a "win-win" in virtually everything we do is important and creates the healthy business atmosphere we want to have.

Always seek a "win" for both parties - I always want my client, employee, or technology user to feel good about a negotiation or discussion to resolve a problem when they leave my office. The more I'm able to create a win-win, the more successful I will be and the stronger my relations will be with those I work with.

As an IT manager, we need others to promote our value and commitment to their business operation. When they spread the word, it is much more powerful than when we try to tell people how committed and sincere we are. Win-win scenarios create the positive reputation that promotes success.

When both parties win, a stronger bond is built - Building strong relationships takes time and lots of effort. When difficult issues arise, being able to develop a win-win solution with the other party is a great opportunity to solidify a relationship. Later, when you need their help, you will get it because you have been there for them when you found a win-win solution to their problem.

If it is not a win for the other party, sooner or later the relationship ends - When the other party (employee, client, senior manager) walks away with a loss in dealing with you, sooner or later the relationship is going to deteriorate and potentially end. None of us want to deal with others who constantly have to get the best deal or who look out only for their own best interest. It may take some time, but sooner or later we will end the relationship. Other people look at this the same way you and I do.
36. 5 Pound Sack

**Description:**
An IT organization, team, or individual employee has a certain amount of capacity just like a five pound sack. You can do things to increase capacity, but once the capacity is depleted, you cannot do more.

Managing to your capacity versus to the need is important for a manager to be successful and in managing expectations of clients and users.

How you use the capacity should be more driven by user/client needs than IT perceptions.

**Key points:**
- IT organization has a defined capacity to do things
- How you use this capacity should be driven by user/client need and priority
- Additional capacity is achievable
  - Overtime
  - More staff
  - Higher productivity
- Managers should manage projects to their capacity versus to the demand

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

A sack that can hold five pounds of sugar has a limited capacity - 5 pounds. Our IT organization, teams, or employees also have a limited capacity.

In the 5-pound sack scenario, you may be able to hold slightly more than five pounds by topping off the bag, but you are not going to add 20% or double what it will hold and fill it to ten pounds of sugar. Our IT organizations are very similar.

**IT organization has a defined capacity to do things** - Any IT organization has a true capacity to do things. This capacity is determined by many things such as the skill you have in place, people's experience level, how people many there are, systems and equipment capacity, etc. One of the things we need to do as IT managers is to assess our organization's capabilities and make a determination as to the capacity that exists in order to manage to the business need placed on us by our company and clients.

**How you use this capacity should be driven by user/client need and priority** - Our clients should always drive how we focus our technology resources. The reason we have technology jobs is to support the needs of the business. It's all about the business and not about technology.

**Additional capacity is achievable** - We can increase our capacity to do things to a certain extent, but there are limitations to this as well.

1. **Overtime** - People can work more hours and will produce more. Incentive programs, overtime, or other things that get more time from people will result in additional capacity.
2. **More staff** - Hiring more staff will add capacity to your organization.
3. **Higher productivity** - Getting more from your staff during their normal work period is another way to add capacity. Developing their skills, giving them more experience, or providing tools or processes that helps improve their productivity will give your organization more capacity.

**Managers should manage projects to their capacity versus to the demand** - There will almost always be more demand for technology support than there is capacity. Manage your organization’s activities to its capacity and not the demand. For example, there may be enough programming enhancement backlog to justify twice the staff you have, but it is probably not prudent to actually hire that many new programmers. Facilitate getting your client to choose the programming priorities so they are involved in managing the work your team does. This involvement will take the pressure off of you while insuring your team works on your client's most important priorities.
37. Change Facilitator

Description:
Technology can have profound impact on the cost structure of a company and the productivity of its people. IT managers are facilitators of change and can impact the business as much or more than any group in the company.

Change can be difficult and to facilitate change effectively requires excellent communication as well as an understanding of what people need in order to deal with new changes imposed on them.

Key points:
- IT managers facilitate change
- Change is challenging for most
- Change requires more communication and follow-up
- People need to know, "What’s in it for me?"
- Every time we change something, we risk breaking something

Category:
- IT Assessment
- IT Strategy & Planning
  - IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Technology is changing rapidly and these changes are having profound impact on the productivity of companies in every industry. Change does not come easily. Because so much of the change revolves around technology, our role as an IT manager becomes one of "change facilitator".

We literally offer our company the opportunity of turning its world upside down and doing things better, easier, and more productively than ever before.

**IT managers facilitate change** - Part of what we do as an IT manager is to introduce change into our company, change that provides value and hopefully makes a positive impact. As we assess needs and issues of the business, these items present opportunities for new or existing technology solutions to make positive impacts for the business. Once funded and committed to by senior management, our role becomes one of "implementing change". Often, this role can create friction with other department managers as most people tend to resist change.

**Change is challenging for most** - Let's face it, change is difficult for most of us. In some cases, people flat out resist it. To be effective in implementing change, it helps to communicate well and share why the change is occurring and what's in it for those affected. Most people respond better when they can understand what it's all about and can see the benefits. Otherwise, they would prefer to leave things as they are.

**Change requires more communication and follow-up** - Communication is key. When you are introducing change to an organization, it becomes more important to communicate proactively in keeping those affected informed. Keeping people "in the light" will defuse many obstacles and will be appreciated by all involved.

**People need to know, "What's in it for me?"** - Help those affected understand how they will benefit from the change and you have much more likelihood of getting their cooperation. Everyone wants to know how change will impact their situation and what's in it for them.

**Every time we change something, we risk breaking something** - One of the reasons people resist change is because there is often pain that comes with it. Anytime we change technology, we have the potential to "break" something. Even the simplest system configuration change can cause turmoil in a company when unexpected results happen. Increase your acceptance in facilitating change by creating a track record that shows you minimize breakage when implementing technology changes.
38. Play your Position

Description:
In any organization, it is important for each team member to do their part to support the team and its mission. Playing your position means taking care of your responsibilities first and helping others when you can, but not when it causes you to neglect your assigned area of responsibility and creates risk for the team’s success.

Key points:
- Stay focused to your assigned responsibility
- When we all execute individually, we succeed as a team
- Listen for the "audible" (responsibility changes made on the fly)
- Playing your position well creates teamwork
- Help others when your area is covered

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

It's very easy to slip into the habit of responding to whatever comes up on a daily basis. This is especially true if clear responsibilities and processes are not implemented that help your team members stay focused.

For a team to achieve its potential, clear responsibilities must be defined and each team member must be able to take care of his/her responsibility. If the manager has done a good job, the team will perform well when each team member handles his/her assignments effectively.

Performance breaks down if the responsibilities are not defined or if team members do not succeed in handling their responsibilities. Either of these issues can cause failure.

Success is achieved when:
1. Clear objectives are identified.
2. Specific responsibilities are assigned that will lead to success.
3. Each employee is trained and has the skills to handle assigned responsibility.
4. Each employee succeeds in his/her assignment.
5. Employees remain focused and do not abandon their assignments.

In this model, I use the "X's" and "O's" of a sample football team play diagram to get the message across. The objective is to protect the quarterback and move the ball forward. When everyone on the offensive line does his job by blocking his assigned defenders, the team will succeed.

The same principal works when focusing your IT team on projects or support responsibilities to meet your company's technology needs.

**Stay focused to your assigned responsibility** - "Misfire" in your assignment and you potentially cause the entire team to fail. Taking care of your assigned responsibility should be your first priority except when pulled off due to unusual circumstances.

**When we all execute individually, we succeed as a team** - Teams succeed when all parts are working in harmony. Focus attention in achieving your assignment and you help your team succeed.

**Listen for the "audible" (responsibility changes made on the fly)** - Business issues may require adjustments to what was initially planned. However, stay in sync with your IT manager and listen for specific changes that must be made.

**Playing your position well creates teamwork** - Team members earn respect when they handle their responsibility and assignments well in supporting the team.

**Help others when your area is covered** - Teamwork means "lending a helping hand", but not if it means leaving your assignment and risking failure for the entire team. Be sure to take care of "your business" first and help others out when possible.
39. Management layers

Description:
We typically want relatively flat organizations, i.e., a large number of employees to manager ratio and as few levels as possible. However, just as you need backup for critical skill areas, you should also create an organization that provides backup and depth in the management areas.

One of the first rules in management is to "find your replacement". Develop key resources to take responsibility for supervision activities and begin developing your replacement. In the event you have to be out, your key people are prepared to step in during your absence.

Key points:
- Companies need flat organizations with a minimal number of managers
- Managers need backup just like key technology skill areas require backup and depth
- Identify your replacement and develop them to step in when needed

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

A company needs just enough people in management positions to get the job done and no more, just as you want the right number of programmers or desktop support people for your support requirement and no more. To staff more is a waste of company resources unless your company is growing rapidly and you are positioning people for higher levels of responsibility.

Build your IT organization as flat as you can with a large number of employees to each capable manager. For young managers, you will want fewer employees assigned to them as they develop their management skills.

Companies need flat organizations with a minimal number of managers - Build your IT organization as flat as possible with a minimal number of management levels. It keeps everyone closer to the operation of the business and reduces waste. Typical number of employees reporting to an IT manager range from eight to thirty or so depending upon the type of organization and the manager's skill level.

Flat organizations are generally more cost effective and preferred by most companies.

Managers need backup just like key technology skill areas require backup and depth - You need depth in the manager ranks just as you do for key skill areas in your technology organization. If a manager leaves or can’t work, someone must step in. Rather than going outside and hiring someone new, it can be beneficial to pull from within the company when possible.

Identify your replacement and develop them to step in when needed - One of the first rules of management is to "find your replacement". If you don't have a potential replacement in your staff, you should be looking for one when you have the opportunity to hire a new employee. Positioning your organization to continue operating effectively after you leave is a responsibility we all have to our company.

Once you have a replacement identified, begin a manager development program to develop the individual's skills and provide experiences that will prepare him/her for the role.
40. Define Responsibility

**Description:**
Getting things accomplished is more effective when people know who is responsible. Leaving responsibility open for discussion causes you to lose productivity, allows finger pointing when the work doesn't get done, and confuses your staff and clients.

When assigning responsibility for tasks in a project, limit it to one person. It's easier to hold one person accountable, even if he/she does not do the work, than it is when multiple people share a responsibility.

**Key points:**
- Everyone needs a clear set of responsibilities
- Detail oriented people need defined responsibilities
- Quantify
  - Responsible areas
  - Processes to handle situations
  - Escalation guidelines
  - Backup guidelines
- Incorporate responsibilities into Performance Plans
- Measure performance as quantitatively as possible
- Assigned responsibilities empowers people to achieve more

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

**Define Responsibility**

Every person in your organization should have a specific set of responsibilities and all members of the team should know what they are. When you don't define people's responsibility, you create too much opportunity for confusion.

Defining responsibility allows you to hold people accountable and reduces the potential of people pointing fingers at one another when things go wrong.

Everyone needs a clear set of responsibilities - We all work better when we know our responsibilities and have the ability to handle them. Everyone needs to have a clear set of responsibilities that should be conveyed to others that you work with.

Detail oriented people need defined responsibilities - Detail oriented people like we have in IT want the "book" that describes their responsibility and if possible how to go about the work to be successful. We owe it to our people to define their responsibilities and give them the first part of being able to be successful in the company.

1. **Quantify** - Quantify people's responsibility and communicate it to others as specifically as possible.
2. **Responsible areas** - Articulate to the individual what it means to be responsible for a given area of responsibility and how to achieve success.
3. **Processes to handle situations** - Help your people be successful by incorporating processes within the organization that facilitates the action necessary to be successful.
4. **Escalation guidelines** - Define escalation guidelines to bring in more skilled resources and experience when necessary to prevent bigger issues from developing.
5. **Backup guidelines** - Define each individual's backup in case he/she is not able to perform due to absence.

Incorporate responsibilities into Performance Plans - Focus each team member on their set of responsibilities by incorporating them into their Employee Performance Plan.

Measure performance as quantitatively as possible - Establish measurement criteria that helps you measure performance as quantitatively as possible. It helps everyone when you can see objective measurements that determine levels of success.

Assigned responsibilities empowers people to achieve more - People generally respond to having responsibility assigned to them. Be clear as to the responsibility and support them in their effort to take charge of it.
41. Every Day is a New Day

Description:
Every day is an opportunity to "start fresh". Even when you are dealing with the most difficult circumstances, today has the potential of being a truly great day.

Approach each new day as an investment in your career and approach it positively to achieve the most important thing for your company and organization that day.

Key points:
- Start fresh each day
- Maintain a "To Do" List and prioritize your day
- Rethink problem situations: alternative approaches often come to light
- Maintain a positive outlook

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Every Day is a New Day

No matter how bad your day was yesterday, today is a new day and one that may bring very positive results.

Approach each new day as the best opportunity you have to do positive things and to boost your career. Don't forget the past but don't dwell on your "bad days" either.

Start fresh each day and make the most of each new opportunity to impact your company, team, employees, and yourself the best you know how.

Start fresh each day - Start each day with renewed focus. As they say, "Today is the first day of the rest of your life.", so treat it that way. A good night's rest and a few hours away from the office can shed new light on problems you might have at work. Start each new day with a positive outlook and positive things are bound to happen.

Maintain a "To Do" List and prioritize your day - You will get the most from yourself and your team when you have focus. Target your day's activities by maintaining a prioritized "to do" list.

Rethink problem situations: alternative approaches often come to light - Use a new day to rethink your problems and to develop options to deal with them. It's often easier to come up with the "right answer" when you are away from the "heat of the battle" and have had time to reflect on the issue. A good meal and time to reflect can have significant impact on your perspective.

Maintain a positive outlook - Above all, maintain a positive outlook. Good things happen to those who look for good things to happen and maintain a positive outlook. Your ability to look at the "bright side" of the ugliest situation sets an example for your team and others to follow. It can make a difference in how business issues are handled.

Positive energy can have unbelievable impact on yourself and others around you. Use the power of positive attitude to your advantage.
42. Be Selfish

**Description:**
"Being selfish" does not mean doing things that are in just your personal best interest. It means being selfish for the other person, your team, company, and also for yourself.

When managing situations, take approaches that minimize your ongoing effort, benefits the company, supports the team, and does the right thing for the employee or client.

Solve problems or take advantage of opportunities by being selfish for all who are involved. It will make your management job easier and more effective.

**Key points:**
- Balance doing the right thing for clients, employees, company, organization, and yourself
- Be selfish when dealing with client satisfaction issues
- Be selfish when dealing with problem employees
- Be selfish when hiring

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

**Be Selfish**

This is one of my favorite models. Being selfish is about taking care of others, not about taking advantage of others. I have coached many employees and young managers that "being selfish" is one of the important guidelines you should manage by.

Keep everyone's best interests in mind by being selfish. Address problem situations and step up to what needs to be done. Even if it means firing an employee, being selfish is actually about trying to help the employee.

**Balance doing the right thing for clients, employees, company, organization, and yourself** - Deal with issues in such a way that benefits as many of the parties as possible including your company, other employees, the client, even yourself. Put yourself last and try to solve situations for the best for all concerned.

You aren't doing anyone any favors by failing to step up to problem situations. The problems will only get bigger in most cases. At some point, certain problems are just not worth the effort to deal with any longer. When that happens, "cut the cord" and move on. It will be better for you and all involved in the long run.

**Be selfish when dealing with client satisfaction issues** - Be the advocate for promoting client satisfaction and know that it is your right to do the things that supports your mission of supporting your client in the highest quality manner. Expect no less from your entire staff.

**Be selfish when dealing with problem employees** - Be selfish as much for the problem employee as for yourself and your team. If an employee is not performing well, there is usually a reason. Either he/she can’t do the job or he/she is unhappy. Step up to the issues and get the performance on track or help the employee seek another career. Ignoring the situation is being unfair to everyone.

**Be selfish when hiring** - I try to be selfish when I hire a new employee. I always look for the best possible person to fill as many needs as possible in my organization. My theory has always been that I would prefer to manage ten "thoroughbreds" who run like the wind than to manage twenty average people. I'll have fewer management challenges, it will be more fun, we will get more accomplished, and I'll probably pay a little less overall.
43. Set the Tone

**Description:**
Leading and managing others means we do a lot to "set the tone" in terms of how our organization responds to client issues, how employees go about their day to day work, and the overall mood of the operation.

IT managers must be aware of the impact we have on others and be deliberate in the "tone" we want to create within our operation in supporting the company's technology.

**Key points:**
- Managers set the tone for organizations
- People are watching and will follow your lead
- People look for leadership and direction
- Create a positive, win-win atmosphere
- Measurements will reinforce the type of operation you desire

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Realize that as the manager of the organization you set the tone of how people should act and go about managing themselves in their support responsibilities. If you exhibit strong client service skills, your employees will probably do the same.

People are looking at you for leadership and they will follow the example you set. You have the opportunity to create a positive and supportive environment or one that is tough to work in. Your actions will help set the tone for the type of environment you will have and how well people focus on their work.

Managers set the tone for organizations - Do positive things, treat others with dignity and respect, and exhibit positive client service action and you will find others in your organization will do the same. Likewise, reward the behavior you want in your organization and people will respond to it.

People are watching and will follow your lead - Your staff, clients, and technology users are watching you and will follow your lead. Be courteous and sincere when dealing with difficult situations and others will do the same.

People look for leadership and direction - Lead by example. Others are watching your example and it can have profound effects. In addition, don't forget the amount of influence regarding what you do or say can have on others in the company. It can be more harmful or more positive than you might think.

Create a positive, win-win atmosphere - Stay positive, especially when in front of your employees. Seek ways for both parties to win when you have problem situations and look for the positive outcome. Coach your employees to approach their responsibilities in a positive and helpful fashion.

Measurements will reinforce the type of operation you desire - When you create specific measurements that reinforce the important parts of running a successful IT operation, it sends everyone the message that you take it serious, plan to hold people accountable, and look for specifics to determine if you are succeeding. Measurements are a great tool to drive your business where you want it to be and to reinforce the issue with employees and clients.
44. Listen

Description:
"Listen" for the true message versus just "hearing" what people are saying. Listen intently and rephrase the issues back to the other person to validate that you understand the pertinent issues.

Listening is a developed skill. Pay attention to your next discussions and see if you can quantify the key points thirty minutes later. If not, you need to work on it.

Key points:
- Listen first, express opinion last
- Listen for meaning
- Listen for subtle issues
- Listen for tangible issues and anticipate need from the message
- Be open for others to express opinions and concerns

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
**Discussion:**

Learn how to listen for content as opposed to just hearing what someone says. In many cases, there are underlying messages in the words people use.

Listening is an important skill that is often overlooked or underrated. It is the first part of being able to deal with a problem client or employee. If you aren't listening, it will be virtually impossible to address the right issues.

**Listen first, express opinion last** - Let the other person talk and give your feedback after they are finished. Too many people compete for the podium and don't listen to what the other person is saying. Listen to them; there will be plenty of time to voice your own opinion on the matter.

Listening shows maturity and confidence. It also shows the other person respect, and that's something that will help you in your effort to address tough situations.

**Listen for meaning** - Don't just hear the words. Listen for what the person is telling you. If you don't understand it, rephrase what you think you heard and seek concurrence until you know what the issues are. Don't assume you know what the issues are; it can get you in lots of trouble.

**Listen for subtle issues** - Sometimes, there are very slight hints to issues that could become real problems left alone. If you hear suggestive comments that might be early warning signs, probe a little deeper to determine if there is cause for concern. If not, move on to better things.

**Listen for tangible issues and anticipate need from the message** - Quantify tangible issues and anticipate future need from your conversations. For example, if your CEO suggests there may be an acquisition in the company's future, you might want to stay tuned into this so you are prepared when it comes to fruition.

**Be open for others to express opinions and concerns** - Listen, don't talk. Let others express their opinions and concerns; it can be a source for some enlightening information.
45. Manage Expectations

Description:
Managing other’s expectations is a major part in being able to achieve success in a management role. Follow a simple process to manage expectations and you will achieve more success.

Key points:
- Managing expectations is key for success
- Improves client relations
- Coach your team on importance and how to go about it
- Simple process:
  - Quantify issues
  - Gain agreement on the issues
  - Present your plan and gain acceptance
  - Deliver what you say you will and when you say it will happen
  - Over communicate
    - Status
    - Milestones
    - Outstanding issues

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

**Manage Expectations**

- Quantify issues
- Gain agreement
- Present plan
- Deliver what & when
- Over communicate

Managing the expectations of others is a key factor in being a successful manager. It may be the most important part in building positive client satisfaction.

You can be the best technology organization in the world, but if you can't manage people's expectations it will be all for nothing because you will ultimately fail.

**Managing expectations is key for success** - Managing the expectations of others is absolutely a key to success. You have to be able to set realistic expectations for senior management, clients, and employees alike and deliver on those expectations to achieve success.

**Improves client relations** - Managing your client's expectations effectively will lead to positive client satisfaction and a client that will be understanding during tough times.

**Coach your team on importance and how to go about it** - Teach your team the importance of this model and how to go about it; they don't automatically know that it's that important or realize what an issue managing expectations is.

**Simple process** - Use a simple process to turn a problem client into a positive situation:

1. **Quantify issues** - Listen to their issues and quantify what they are.
2. **Gain agreement on the issues** - Rephrase the issues back to the client and gain an agreement that the list has identified all issues.
3. **Present your plan and gain acceptance** - Develop your plan and present it to the client explaining how you plan to resolve the issues. Gain agreement that when you have completed your action plan that the client will do their part in building a positive relationship.
4. **Deliver what you say you will and when you say it will happen** - Implementation is key so your plan should be somewhat conservative and have plenty of room to achieve what you say you will do by when you say it will happen.
5. **Over communicate** - Over communicate on all aspects of the plan:
   - **A. Status** - Don't let the client wonder about the status of your efforts.
   - **B. Milestones** - Define key milestones and celebrate their achievement.
   - **C. Outstanding issues** - Quantify outstanding issues and your action plan to address them.
46. Follow-up

**Description:**
Strong follow-up skills exhibit maturity and enhance positive relationships. Managers who follow-up well and who have organizations that do the same are much more effective than those who lack these habits.

Follow-up to close the loop on open issues and as a courtesy to those you work with. It is a habit that will be appreciated more than you realize.

**Key points:**
- Close the loop
- Do what you say you will do and when you say it will happen
- Helps you manage expectations
- A significant client service issue

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

So many people these days lack good follow-up skills. It is a skill that will make a real difference with those you work with and builds a professional image of how you conduct business.

Following up on outstanding issues is more than the professional thing to do, it is also a courteous thing to do and shows that you respect the other person. Nothing irritates me more than when someone does not follow-up when they have committed something to me. It doesn't have to be a major thing, maybe it's just a phone call they promised to make. Bottom line is that if you can't follow-up on a commitment, don't make the commitment in the first place. It kills your credibility.

Close the loop - Follow-up on all outstanding issues to "close the loop". I try to follow-up with email messages, phone calls, and any type of communication to insure the other party knows we have closed the loop. People don't like having loose ends and this prevents that from happening.

Do what you say you will do and when you say it will happen - This bullet says all we need to say about the issue.

Helps you manage expectations - Following up consistently gives you the opportunity of managing people's expectations. Take advantage of this opportunity and it will make your work much easier. It also creates the type of relationship with others where they will give you room for error when mistakes are made.

A significant client service issue - Following up with people does not take that much time and effort plus it is the professional thing to do. It will make a big difference in managing your client's expectations and that improves client satisfaction.
47. IT Assessment Focus

**Description:**
Assessing your situation is possibly the most important part of managing technology resources effectively. There are key components in assessing any situation. Look for risks, opportunities, and issues as you assess stability, scalability, supportability, and cost.

Developing an ability to assess a technology situation from a business perspective is the first step in positioning yourself and team for success.

**Key points:**
- Identify and quantify
  - Risks
  - Opportunity
  - Issues
- Major elements to consider
  - Stability
  - Scalability
  - Supportability
  - Cost
- Don't solve; simply discover and quantify

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Assessing your technology situation is the first part in starting any new IT management role. It's hard to know what to do if you don't know what the business needs are and the issues that exist.

Assessing the technology of a company effectively positions you to work on the issues that provide real value to the business. The objective is to quantify all the risks, opportunities and issues that exist as they relate to stability, scalability, supportability, and cost.

Identify and quantify - Interview senior management, department managers, clients, and key people in the IT department to determine business needs and issues that pose risk or opportunity possibilities.

- **Risks** - business risks such as compliance, fragile employee situations, systems problems, etc.
- **Opportunity** - potential to leverage technology that produces cost savings, higher productivity, etc.
- **Issues** - any issue that has a technology implication or requires technology resources to address it

Major elements to consider - Quantify any issue that has an implication in one of the following categories:

- **Stability** - systems or organizational stability
- **Scalability** - systems, process, or organizational scalability
- **Supportability** - ability to maintain support of your systems and client base
- **Cost** - one-time cost implications or ongoing operational cost issues

Don't solve; simply discover and quantify - When assessing technology, you just want to discover, not solve. Solving comes later with strategy and planning. The important thing at this point is to identify all the issues that have technology implications.
48. Think Out of the Box

**Description:**
Sometimes the most complex problems have the simplest solutions. Take problems and break them down into simple components to determine an approach that addresses the issue in a cost effective manner.

Look for non-traditional solutions that solve the issue without requiring the standard cost and effort. Give your employees the flexibility to think "out of the box" in supporting technologies.

**Key points:**
- Difficult problems often have simple solutions
- Seek low cost alternatives
- Empower others to solve problems
- Coach your team to "think out of the box"

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Some of the most difficult challenges have very simple solutions. I remember recommending to a remote office manager that they use their cell phone to handle infrequent support calls for a new technology when their phone system had no capacity to add a new phone drop next to the new system. The solution was unusual, but it saved the company several thousand dollars for a situation that probably took place less than six times a year at a time when saving a few thousand dollars was important.

Many times, the obvious approach is not necessarily the approach that makes most sense when placed side by side the options that are available to solve the issue.

Difficult problems often have simple solutions - Difficult situations can have simple solutions, if you kick around the options and possibilities to solve the issue. Sometimes, just solving an issue is not actually what we want to do; it might be a workaround or something that eliminates the risk or lets us deal with the problem at an acceptable level of risk. For example, buying a generator to keep our systems up and running during a power outage may be a solution, but it might also be perfectly acceptable to avoid the cost and deal with infrequent downtime that lasts a few hours at most.

Seek low cost alternatives - When looking for solutions to problems, look for low cost alternatives. IT tends to have a reputation of being too willing to spend the company's money without having valid business need for it. Seeking low cost alternatives will help you change this perception.

Empower others to solve problems - Give your employees an opportunity to help you resolve problems. They often have excellent insight and can come up with approaches you would never think of. Applying more minds to a problem can be a powerful problem solver.

Coach your team to "think out of the box" - Help your team analyze alternative and non-typical solutions. Show them that it's all right to develop solutions that are not "the norm", and that often these solutions are the best.
49. Problems are Opportunities

Description:
Many problems are actually opportunities in disguise. Turning bad situations into positive outcomes can be straightforward. Approach the issue with a positive attitude, eliminate emotion from the equation, and work for a win-win.

Use a simple approach to gather the issues and determine a solution.

Key points:
- Create a win-win opportunity
- Solving client problems may actually be worth more money
- Take a 6-step approach
  1. Ask for input
  2. Quantify the issues
  3. Seek agreement on the specific issues
  4. Propose a solution
  5. Gain approval
  6. Implement the "fix" with vigor
- Look for the opportunity with every problem

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Every problem is an opportunity waiting to be discovered. I love to find problems because I know there will be an opportunity in there somewhere. The worse the situation, the better I like it because that spells even more opportunity.

Approach problems as opportunities and you change the entire perspective of your situation from a negative to a positive. It can have far reaching implications on your success as an IT manager or CIO.

Create a win-win opportunity - Solve problems so all parties come out a winner whenever possible. This builds stronger relationships and trust.

Solving client problems may actually be worth more money - When you solve an external client problem, it may require more of your resources and justify more money to be paid to your company. Resolving the problem in many cases is worth considerable more money to a client so if it requires more, ask for more. It is still a win-win.

Take a 6-step approach - Follow a simple approach in identifying a problem and resolving it to a client’s satisfaction:

Ask for input - Let the client tell you the problem. Do not try to solve it yet; simply listen for the issues and let the client get it off of his chest.

Quantify the issues - When the client finishes, list the issues you heard and rephrase back to him.

Seek agreement on the specific issues - Verify with the client that you have captured all the issues.

Propose a solution - A proposed solution may be one that you bring back to the client in a week. You may not have to fix it today, but you will need to give the client the steps you are going to take. When you do propose a solution, be conservative so you are sure you can get it all done and on time plus know that the solution will solve the problem. If it doesn’t, be open with the client and tell him there is risk in the proposal completely solving the issue.

Gain approval - Get the client’s approval and commitment that your proposed solution is acceptable. Also get a commitment that when resolved, whatever issues the client has will also go away and that you will be on the way to building a stronger business relationship. For example, if the client owes money, get a commitment that your invoices will be paid upon resolving the issue.

Implement the "fix" with vigor - Do what you say you will do and communicate status often.

Look for the opportunity with every problem - Every problem has a solution. Look for the opportunity for all parties when solving any problem.
50. Budget Buffers

Description:
Inserting a few buffers into your budget can make all the difference in submitting an achievable plan for next year. In general, there are only four to six major budget accounts that are tangible in an IT budget. Do a good job in developing your budget for these accounts and you have a high percentage of achieving your budget.

Key points:
- Four to six budget accounts are key
- Build logical buffers into major budget accounts
  A. Payroll
     - New hires
     - Recruiting fees
     - Salary increases
  B. Telecom
  C. Travel and entertainment
  D. Hardware and software maintenance
  E. Projects
     - Cost
     - Timeframe to complete
     - Timing of savings

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

When you budget for an IT department, you can increase your odds of submitting a budget you will achieve tenfold by knowing where the budget buffers are.

Building in buffers into a budget so you are conservative is smart management; failing to do this is not smart at all. An IT budget usually has four to six key accounts that are significant. Do a good job in budgeting these accounts and you will almost always achieve your budget in the operational year.

Four to six budget accounts are key - These "big accounts" usually have over 80% of your budgeted dollars. Understand how your organization spends money in these areas and you have most of the budget nailed.

Build logical buffers into major budget accounts - Use these large accounts to build in logical buffers that make your budget conservative and able to absorb the surprises that are always going to happen every year. The surprises may be different each year but there will be unknown surprises to hit your budget every year.

1. Payroll - Be sure to include all employees, part time help, and contractors. Payroll can be 60% of your budget or more. Be thorough with this account and you will be ahead of the game.
2. New hires - Target start dates and include all costs associated with hiring and starting a new employee. Factor in a certain number of new hires for employee replacement needs.
3. Recruiting fees - Assume you use recruiting fees for all new hires including new hires to refill positions vacated by former employees. Be conservative.
4. Salary increases - Build in raises at appropriate dates and planned increase percentages.
5. Telecom - Review past year trends, anticipate company changes, and budget conservatively.
6. Travel and entertainment - Be conservative in calculating average trip cost, number of trips, etc. Review past trends to validate your understanding of travel needs.
7. Hardware and software maintenance - Assume cost increases based on contracts as well as user license additions and any other software compliance issues you might have.
8. Projects - Be sure to include all major projects and their costs in your budget.
   A. Cost - Assume projects will cost more than anticipated
   B. Timeframe to complete - Assume projects take longer to complete than expected
   C. Timing of savings - Assume savings will take place later than planned and take longer to accumulate than expected.
51. Cost Saving Strategies

**Description:**
Every company has cost saving opportunities. It behooves a CIO to maintain an active cost saving strategy. IT Managers that have built a track record of finding ways to reduce expenses through technology initiatives gain a strong appreciation from senior managers of the company.

IT has an ability to help other departments of the company reduce expense or improve people productivity. Pursuing specific cost saving strategies that benefit the company positions IT as a leverage operation as opposed to being viewed as a “cost center” that spends money.

**Key points:**
- Every company has cost saving opportunities
- CIO’s should initiate a cost saving strategy
- Positive track records can take the pressure off of IT during budget cuts
- Target and prioritize your efforts
- Go for "low hanging fruit" first
- "Quick hits” can lead to major successes

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Cost Saving Strategies

The IT Department can have powerful impact on virtually every part of your company, especially in the realm of reducing costs. Because of this, every CIO should combine forces with the CFO of the company and maintain a formal cost saving strategy for the company. Sooner or later, the company is going to need it.

It's easy for executives to perceive IT as a department that spends money without an understandable reason. Implementing cost saving strategies that help improve the company's bottom line can go a long way in changing that.

Every company has cost saving opportunities - There are cost saving opportunities in every corner of a company. It's a matter of knowing where to look, how to find it, and how to go get it. Even companies that believe they are doing an excellent job in maintaining their costs have significant opportunities.

CIO's should initiate a cost saving strategy - A CIO is in an excellent position to initiate a cost saving strategy for the company. In most cases, there are significantly more savings in the operational departments than you can get from the IT department. You should always look beyond your IT department as well as within it.

Positive track records can take the pressure off of IT during budget cuts - Establishing a positive track record of going after and getting cost savings for the company can take the pressure off of IT when the company issues department budget cuts. Often, a CEO and CFO will actually spend more in IT because they know the value of such an investment in being able to attain greater savings in other areas of the company through technology innovation.

Target and prioritize your efforts - Target specific cost saving objectives and forecast the savings with each project.

Go for "low hanging fruit" first - Go after the easy cost savings that require little to no investment or effort first. When you look around, you might be surprised at the opportunity that exists in your company.

"Quick hits" can lead to major successes - Little successes can lead to bigger saving opportunities. When implementing a cost saving strategy, it's wise to achieve a few early wins so people can see that it's for real. Maintain a log to show senior executives the progress; it will be a very popular and positive thing for you to track.

Note: For 50 cost saving strategies I've used, take a look at www.mde.net/strategies
52. Uptime is King

**Description:**
Maintaining systems availability and uptime is an essential part of supporting the technologies of a company. We have to manage our IT support activities such that user access to their systems is one of our highest priorities.

Establish procedures and manage your organization so everyone knows you are serious about maintaining a high level of systems availability.

**Key points:**
- Systems availability is essential
- Systems uptime and availability are major client service issues
- Uptime improves productivity and morale
- Minimize user impact with scheduled downtime
- Over communicate when systems are down

**Category:**
- IT Assessment
  - IT Strategy & Planning
  - IT Project Management and Processes
    - IT Organization and Staff
    - IT Financial Management
    - IT Measurements and Communication
Discussion:

Want to kill your credibility as an IT manager or possibly get you fired? Have a lot of systems downtime; it is certain death to any CIO or IT manager, and probably should be.

A major part of our role in managing the technology of a company is to maintain the technology so it is available to those who need it to do their jobs. The only reason we have jobs in technology is because there are operational people in the company providing the products and services of the company who need access to technology we support. Otherwise, they don't really need us, and most would prefer not to have to deal with a technology organization. They just want the technology to work so they can get their work done and go home.

**Systems availability is essential** - People can't work if the systems are down or they do not have connectivity. It's a tremendous loss of productivity whenever a system is lost and everything should be done to respond quickly when it happens and to prevent downtime as much as possible given the cost considerations that make sense for the company.

**Systems uptime and availability are major client service issues** - Loss of systems availability will destroy client satisfaction as fast as anything. Even though the downtime issue may be beyond your control, it will be perceived as an IT problem.

**Uptime improves productivity and morale** - Users expect the systems to work so they can get their job done. It's a minimum "meets requirement" type of issue as far as they are concerned. Maintaining stable systems and preventing downtime boosts morale and improves productivity of the company.

**Minimize user impact with scheduled downtime** - The systems and networks are the company's user's systems, not yours. Treat them as such when you are scheduling downtime for routine maintenance, upgrades, etc. We have plenty of holidays, weekends, and the "wee hours of the night" when minimal people will be affected to schedule downtime.

**Over communicate when systems are down** - When a system is unavailable, set up processes to keep users aware often as to the status of the situation and the expected time recovery will be achieved. It will lessen the frustration somewhat and help others know you are on top of the situation.
53. Disaster Recovery

Description:
We don't really expect to go through a disaster, but if we plan our recovery in case it was to happen, we sleep better.

How much time could your company afford to be without systems and still operate? This answer depends on the nature of your business and its dependency on technology.

Develop a recovery plan that is appropriate for your business and that everyone can live with. Once the plan is built, test it to validate it will work.

Key points:
- Anticipate the worst
- Define specific recovery steps for each business level
- Determine an acceptable level of redundancy
- Walk through a real disaster recovery process

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

If you ever actually go through a disaster recovery process, you will know how important it is for your company.

It is every IT manager’s responsibility to ensure his/her area of responsibility is protected and able to be recovered in event of a disaster.

Take your role in disaster recovery serious and do your part in protecting your company.

**Anticipate the worst** - Anticipate the worst possible scenario in that the company’s entire data center that houses all the company’s systems and primary network equipment is completely wiped out by tornado, hurricane, or flood. What would you do? Do you have a plan that allows you to restore your data center quickly? How long will it take? Remember, your company is out of business until you get the technology back "on line".

**Define specific recovery steps for each business level** - Every business aspect of the company affected by such a disaster has to be recovered. Develop specific recovery steps, workaround options, and temporary means of supporting the business at every level of the business. Focus on the mission critical business elements and design your plan to recover those units first.

**Determine an acceptable level of redundancy** - Most companies cannot afford total redundancy that would automatically turn on in the event of a disaster. Every company should determine it's level of downtime tolerance and build in redundancy and a recovery plan that supports it.

For example, being totally down for a week, even two weeks or more may be acceptable in the event of a natural disaster for some companies. In other cases, this amount of downtime might be totally unacceptable. Every company has its own threshold for pain related to downtime. You should determine your company’s tolerance level and plan accordingly.

**Walk through a real disaster recovery process** - Building a disaster recovery plan does no good if it doesn't work. To be certain, you should test parts of it to ensure that in the event you have to recover, you actually can.
54. Backup

**Description:**
Maintaining quality backups of data and software programs is essential for any IT organization. Without it, you are placing your company in a position of significant risk.

Backups should be maintained at several levels and validated to ensure they will actually recover your systems environment successfully.

With the cost of storage at an all time low, there is no excuse for failing to maintain complete backups of all data and software for your company.

**Key points:**
- Define a specific backup process and responsibility
- Test your recovery process
- Inspect the backup process periodically
- Maintain off site backups
- Create backups of all vital company records

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
  - IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Data and system backups are your first line of defense in the event of a catastrophe. It is our responsibility in IT, and ours alone, to ensure the company's systems, application software, and related data maintained on the company's computer systems are backed up and can be recovered as needed in the event of a systems failure.

Maintaining adequate backup for recovery processes is one of the "absolute must do" components of any IT manager's job. Take this responsibility seriously.

In addition to computer programs and data, you should maintain backup information of critical paper files and business information such as contracts, etc. off site.

**Define a specific backup process and responsibility** - Be very specific as to how backups will be performed and who is to be responsible. Do not leave any possibility for misinterpretation of how backups are to occur and ensure that the process takes place even when responsible resources are absent.

**Test your recovery process** - Inspect your backup process to be certain that it works well in a recovery process. Nothing is worse than to try to load your backup data and it doesn't work.

**Inspect the backup process periodically** - Inspect the process often to ensure all new programs and data are being saved as you believe they are.

**Maintain off site backups** - Maintain a set of backups offsite just in case your entire building is destroyed. Place them far enough away so that the same disaster does not wipe out both your local and offsite backup.

**Create backups of all vital company records** - Create backup copies of vital business records such as contracts, license agreements, employee records, etc. and store offsite. One very good way to do this is to scan the records and save the images onto your data drives. When you backup your systems data, these records will automatically be saved as well in your normal process.
55. Verify References

Description:
Save yourself a lot of headaches by verifying people and vendor references. It only takes a small amount of time and might very well prevent significant losses in dollars and productivity.

Verifying references applies to hiring new employees, hiring consultants or contract workers, purchasing equipment and software from vendors, etc.

Key points:
- Validate references:
  - New employee prospects
  - Vendor
  - Consultant
  - Contract workers
- Validate vendor client references when buying new technology
  - Client satisfaction
  - Product/service capabilities
  - Support and responsiveness

Category:
- IT Assessment
- IT Strategy & Planning
- **IT Project Management and Processes**
- **IT Organization and Staff**
- IT Financial Management
- IT Measurements and Communication
Discussion:

You can save yourself many headaches by verifying references in certain situations, primarily when hiring a new employee and when purchasing expensive vendor products or services. It does not take that long to make a few phone calls, and the information you gather can save you a lot of time and money.

Just because someone says they can do the job does not mean they really can or that they even have necessary experience in the matter. Verify their references to validate their claims before using them in your business.

Validate references - Ask for references when hiring or planning to use outside resources for expensive products and services. It can prevent significant loss of time and money and provide you additional insight into your issue. Verify references for the following groups:

1. **New employee prospects** - Resumes can paint a wonderful story, but reference checks will validate whether they are true. Check them out.
2. **Vendor** - Too many people simply take the vendor's word. That's a big mistake, especially for large software contracts that require significant time and money to install. Ask for a complete client list and pick the references that match up as close to your company's business as possible.
3. **Consultant** - Determine if the consultant will add value. Picking one that will actually be able to help you versus talk a good game can be difficult. Verifying references can help you select a good one and prevent considerable pain.
4. **Contract workers** - Talk to previous employers to verify the quality of a contract worker's performance.

Validate vendor client references when buying new technology - Buying new technology always has a certain amount of risk. Reference checks can reduce the risk considerably and should always be conducted before entering into a long term relationship with a software or hardware vendor. Validate several things such as:

1. **Client satisfaction** - What’s the vendor's level of client satisfaction and why is the satisfaction good or bad?
2. **Product/service capabilities** - Does the feature/function described by the vendor exist and are clients using it as you believe the functionality is needed for your company. You can learn a lot in this regard, maybe even discover a better way to handle a business process.
3. **Support and responsiveness** - How responsive is the support from the vendor. When you have problems, it's better to know now how the vendor will respond in identifying and solving your problem.
56. Quality Assurance

**Description:**
Verifying the quality of the products and services you provide is a key element in developing positive client satisfaction.

Implement QA processes for every part of your support service delivery to ensure the client receives a quality product. Inspect as needed to maintain high quality throughout your support organization.

**Key points:**
- High quality is critical for positive client satisfaction
- Quality is more important than quantity
- Quality delivery ultimately improves productivity
- Create a QA process in every important service delivery function
- What gets inspected gets done
- Be cautious of overdoing it and destroying productivity

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Delivering high quality technology support services will improve client satisfaction and build strong relationships with your clients. Any product or service provided to others should have a quality assurance component.

Our IT employees do not always appreciate the value of delivering a high quality service. They especially lose sight of or do not understand the impact on productivity that poor quality has on the support operation.

In our role as an IT manager, we have to recognize the value of high quality and the benefits it provides to both our clients as well as our support team.

**High quality is critical for positive client satisfaction** - Delivering services that have high quality enhances client satisfaction. No one likes getting help from another and as soon as they leave, their improvement breaks or causes a failure somewhere else in our systems. Delivering technology support services that work and work the first time is a critical part in building positive client relationships.

**Quality is more important than quantity** - It is more important to deliver high quality services than high quantity of services that have poor quality. The breakage factor will outweigh the additional quantity of services delivered every time.

**Quality delivery ultimately improves productivity** - Delivering services in high quality improves productivity for both the client as well as your support staff. Go slower and provide a better product or service and watch your productivity measurements soar like never before.

**Create a QA process in every important service delivery function** - Anything you deliver to others is worth having a QA process to ensure high quality. Take the time to determine how you deliver a higher quality service or product in every facet of your technology support business.

**What gets inspected gets done** - When you inspect something and people know it's going to be inspected, quality will improve almost on its own because people will pay more attention and be more conscientious.

**Be cautious of overdoing it and destroying productivity** - You can QA something to death and kill your productivity. Look for balance and manage the two competing areas of quality and productivity.
57. Project Management

Description:
Successfully implementing projects is the cornerstone of success for any IT Manager and the key to your credibility.

Develop a project management culture in your organization, implement a structured approach, and see the results for yourself.

Key points:
- Create a project management "mindset"
- Use a structured approach in managing projects and expect success
- Manage the triple constraint of time, money, and resource
- Pay attention to the seven keys in managing projects successfully:
  - **Scope** - Clearly define objectives and deliverables up front
  - **Resources** - Identify team members from IT and other departments, vendor and outside elements, facilities, equipment and other resource needs
  - **Budget** - Define the cost of the project and timeframe of the expense
  - **Plan** - Include tasks, responsibility, and timeframe
  - **Execute** - Implementation of the tasks is key
  - **Monitor** - Status meetings keep the project on track
  - **ROI** - Manage projects to have a "return on investment"

Category:
- IT Assessment
- IT Strategy & Planning
- **IT Project Management and Processes**
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Managing projects successfully is the "cornerstone" of building your credibility as an IT manager.

Using a structured approach in managing projects takes more effort and sometimes meets resistance, especially in small and medium size companies. Creating a structured project management culture in your company will move you from the type of company that rarely completes projects on time and within budget to one that almost always succeeds in those categories.

Create a project management "mindset" - Create a culture in your organization where everyone automatically thinks of using a project management process and tools anytime they are starting a new project. It needs to become an "automatic" approach anyone takes when working on a project.

Use a structured approach in managing projects and expect success - Use industry tools and templates that help you incorporate a structured approach with your projects. A structured approach is going to help you complete your projects successfully.

Manage the triple constraint of time, money, and resource - There are three components of a project called the "triple constraint: time, money, and resource. If any one of these three elements are affected in a project, they can have significant impact on one or both of the other two. There is almost always a direct cause and effect relationship with these three project components.

Pay attention to the seven keys in managing projects successfully:
- **Scope** - Clearly define objectives and deliverables up front
- **Resources** - Identify team members from IT and other departments, vendor and outside elements, facilities, equipment and other resource needs
- **Budget** - Define the cost of the project and timeframe of the expense
- **Plan** - Include tasks, responsibility, and timeframe
- **Execute** - Implementation of the tasks is key
- **Monitor** - Status meetings keep the project on track
- **ROI** - Manage projects to have a "return on investment"
58. Help Desk

Description:
A Help Desk can improve your responsiveness to client needs plus capture vital data that gives you insight on where to improve your operation.

Your Help Desk resource is the first line of defense and the first person your client comes into contact with. Staff this position with people who have credible and professional skills.

Capture pertinent data and analyze it to improve your support business.

Key points:
• First client contact establishes the quality of your operation
• Capture data to measure your operation’s effectiveness
• Understand the trends
• Key measurements:
  • Support needs issues and trends
  • Responsiveness
  • Effectiveness
  • Productivity and effort

Category:
  IT Assessment
  x IT Strategy & Planning
  x IT Project Management and Processes
  IT Organization and Staff
  IT Financial Management
  IT Measurements and Communication
Discussion:

A Help Desk function can be an invaluable source of information in helping you manage an IT operation. Help Desk data can be gathered to tell you what type of problems you are having, where they are coming from, and how long it takes to address the issue.

Implement a Help Desk database and reporting system in your technology support operation to stay in the loop as to what's going on and analyze the data to discover where you need improvement.

First client contact establishes the quality of your operation - When you set up a Help Desk of any kind, be sure the people talking to your clients are professional, articulate, and responsive. This person is who your client sees so their professionalism, or lack of it, sets the tone for who you are as an organization.

Capture data to measure your operation's effectiveness - It's all about the data, how you analyze it, and what you do with the information. When thinking about the type of data you want to collect, make a real effort to define data that will help you understand your business better and improve it.

Understand the trends - The trends of what type of support issues you are getting, where they are coming from, etc. are in essence telling you where to focus attention. Eliminating the source of problems will reduce your support calls which in turn reduces effort to fix things. It all leads to improving your organization's productivity.

Key measurements - Some of the categories you want to track and measure from a Help Desk include the following:

1. Support needs issues and trends - Who needs help and what type of help are they asking for?
2. Responsiveness - How long does it take to respond and to solve the problem?
3. Effectiveness - Is your team getting better at solving specific types of problems. Are you reducing the number of certain types of problems by implementing preventive measures?
4. Productivity and effort - Who is doing the most work and who is becoming more productive over time?

The trends and data will tell you the story of these issues and many more.
59. Observe

Description:
Managers should continually observe their environment and look for areas of improvement or to anticipate potential issues.

Observing others can keep you aware of what's going on in your operation, help you anticipate need, and provide personal insight that only an experienced manager might understand as a potential problem or opportunity.

Key points:
- Constantly observe your environment
  - Morale
  - Client relationships
  - Stability
  - Possible impacts
  - Skills
  - Potential opportunities
- Observe to stay informed
- Observe to inspect
- Conduct "walkabouts"

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

It pays to observe what's going on around you. Listening to what clients and employees are saying can be early warning signals. Paying attention to your environment can help you identify issues early and prevent or eliminate future problems.

In an assessment, one of the things you need to do is take a physical tour of the technology environment. You can learn quite a bit about how organized and efficient an IT organization operates by just walking around and observing.

**Constantly observe your environment** - I'm always watching and listening. It's called "staying awake" and paying attention to what's going on. No need to be paranoid, but you can learn a lot about what's happening by observing people, their actions, and the way they interact with others, especially with clients. When observing, pay attention to several things such as:

- **Morale** - Is it good, poor, or hard to tell?
- **Client relationships** - How do employees interact with clients and what's the feeling you get about client satisfaction?
- **Stability** - Are individuals stable and happy or are they nervous and disenchanted?
- **Possible impacts** - Do you sense possible problems? Do the conversations go quiet when you walk in the room? How do people interact with you and other managers of the company?
- **Skills** - Observe the knowledge and skills displayed by your team and others.
- **Potential opportunities** - Do you see opportunities to help others through technology? Are there opportunities in your own group to improve based upon your observations?

**Observe to stay informed** - Observation helps you stay informed. Make it a point to be an observer who is aware of your environment and what's going on around you.

**Observe to inspect** - You can observe the quality of work, appropriate communication with clients, trends in support issues, and any number of things to determine the state of your support business.

**Conduct "walkabouts"** - There is nothing like walking around the building and observing people in action. You can learn a lot doing periodic "walkabouts".
60. Experts and Depth

Description:
An IT organization needs expertise with certain skills and depth in critical support positions. You have flexibility in how to fill this need, but it is an area that requires planning and forethought.

Hiring situations present a unique opportunity to add experts from outside the company and an aggressive employee development program can build both experts and depth to your organization.

Key points:
- Critical skill positions need experts
- Critical skill positions also need depth or backup resources
- Hire new employees or outsource your needs as appropriate for your company
- Implement an employee development program to build expertise and depth

Category:
- IT Assessment
  - x IT Strategy & Planning
    - IT Project Management and Processes
  - x IT Organization and Staff
    - IT Financial Management
    - IT Measurements and Communication
Discussion:

Every team needs a few experts in certain skill areas and depth in critical business support functions. When developing a staffing plan, you want to identify specific skills where you need to have experts and where you need additional bench strength. Your staff development plans should be developed with both of these needs in mind.

There are several ways to add experts and depth to your teams. You can hire new employees with the skill or you can invest in your existing employees and develop the needed skills. A third way is to provide the skill through an out-source agent.

Critical skill positions need experts - There are a few skill areas where you need real experts. In most companies, that includes systems administration and network management skill and possibly business application expertise in business analysis, database administration, or application programming.

Critical skill positions also need depth or backup resources - If you lose an expert, you don't want to be at risk in being able to maintain your systems. Certain critical business critical support positions need to have depth so you will continue to function if a key person is absent.

Hire new employees or outsource your needs as appropriate for your company - You can hire, develop your staff, or out-source both experts and depth as you see fit. Every company is different and has a different philosophy in this regard. The key is to identify what you need in terms of experts and depth and build a reasonable, cost effective plan to put it into place.

Implement an employee development program to build expertise and depth - Employee development plans should be a requirement of every IT manager. Be proactive and invest in your staff by developing an employee training and education plan to develop their skills. It is one of the most powerful motivators and employee retention tools you have. Invest in your people and you will be rewarded.
61. I knew this was a snake when I picked it up

**Description:**
Trust your instincts in situations. More than often, our instincts are pretty good and can be early signals of trouble. Observe your environment to constantly assess what's going on in your operation and to anticipate possible issues.

Take caution until you confirm your suspicions that a situation is "snake like" and could bite you when dealing with it.

**Key points:**
- Trust your instincts
- Confirm your suspicions
- Minimize the damage potential of a situation until confident
- Beware the "good talker" who lacks substance

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication

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Discussion:

You should pay attention to your instincts. They may not be foolproof, but they can often be sound indicators of when something is "not quite right".

Listen to your "inner thoughts" and learn to trust your instincts about people, situations, and issues surrounding your area of responsibility.

If you think something is a "snake", treat it with caution until you are able to validate whether it really is or not.

Trust your instincts - Our instincts about things are more right than they are wrong. Learn to trust them about situations and how to approach "questionable" issues carefully until you know what you are dealing with.

Confirm your suspicions - It's always important to confirm your suspicions before categorizing someone or something as a "snake". Give everyone the benefit of the doubt, but if your internal radar is saying, "caution"; then go slow until you know for sure it's a safe situation.

Minimize the damage potential of a situation until confident - By using caution initially, you will minimize any damage you might incur.

Beware the "good talker" who lacks substance - There are a lot of people who can "talk a good game", but lack any real substance to get things done. Good intentions are nice but not worth a whole lot if you can't back them up. Be particularly cautious in buying from vendors you don't really know and in hiring new people until you have taken steps to verify their credentials and that what they say they can do has been experienced by solid references.
62. Focus

**Description:**
Focusing your staff on the right things requires proactive action in assessing, planning, and gaining commitment from senior managers of your company. Once the commitment is made, focusing the employee is actually fairly simple by assigning responsibility, assigning specific projects, and delivering performance plans and reviews.

Coach and lead by example to focus your employees on important issues in carrying out their support responsibilities.

**Key points:**
- Define your objectives
- Gain management agreement and commitment
- Assign responsibilities to achieve objectives
- Performance plans and reviews are key
- Inspect
- Coach, encourage, acknowledge and reward

**Category:**
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

Focusing your resources on the important issues of your business is critical if you want to be successful. As the manager, you have the opportunity to see the business and its related issues at a higher level than your employees. This "10,000 foot view" gives you a better perspective of the overall landscape of your support mission, challenges, and where to direct your staff for the greatest impact for the company.

It is our job to bring clarity to the work we do in a way that has every person on our team focused to help the team contribute the most for the company.

Define your objectives - Clearly define your team's objectives so each member of the team knows what you are going to accomplish and why. This also helps your clients and internal users of technology so make them aware of where you are headed.

Gain management agreement and commitment - Always gain agreement as necessary to ensure your objectives are in sync with company needs and provide value to your client.

Assign responsibilities to achieve objectives - Assign specific responsibilities to each member of your staff that support your organizational objectives.

Performance plans and reviews are key - Performance plans and reviews are not only essential, they are key tools to help you establish the focus you need for each individual to have and in being able to hold them accountable.

Inspect - What gets inspected gets done. Never assume the job is getting done unless you have inspected to ensure it is. It's not as much of looking over someone's shoulder as it is good management to inspect that your plans are being carried out as intended. Honest mistakes or misinterpretation can wreck the best of plans.

Coach, encourage, acknowledge and reward - Coach your employees to keep them focused to the real issues. Encourage and acknowledge their successes in getting your mission accomplished and reward desired behavior that promotes the success of your team.
63. Escalation

**Description:**
Escalation steps should take place automatically for certain circumstances. Develop processes and teach your IT staff how and when issues should be escalated and to whom the escalation needs to go.

Every type of business has circumstances that justify escalation to higher level managers. Establish your IT escalation procedures to protect the business and to help your team be successful.

**Key points:**
- Define escalation procedures: What, when, and to whom
- Build escalation procedures that help your team succeed
- Escalation procedures protect the business
- Coach your team so they are "automatic"

**Category:**
- IT Assessment
- IT Strategy & Planning
- **x** IT Project Management and Processes
- **x** IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

There are times when issues need to be escalated to more experienced people in your organization. Sometimes, the information may need to be escalated to senior management outside of your organization. It is important to establish clear escalation procedures in your organization so critical business issues get the proper amount of attention at the earliest possible moment.

Escalating when appropriate should be automatic and simply part of the process of supporting the technology.

Define escalation procedures: What, when, and to whom - When defining the escalation procedures you need in your IT operation, you must be specific as to what requires an escalation act. Define clearly to whom the escalated message should go to or what does one do in the escalation procedure. You also should define when an issue gets escalated. In my IT operations, I will set up escalation procedures for all types of business situations when I believe it will improve our support operation. In a few cases, I want to be notified immediately so I can be sure we are looking at the problem with a management perspective as well as a technical one.

Build escalation procedures that help your team succeed - Escalation procedures can help your team be more successful because they position the team to be more responsive to problem issues that can occur. Getting stronger skills on a "down system" issue quickly in order to minimize the downtime you might incur is a positive thing for all involved.

Escalation procedures protect the business - Protecting the business is our job when it comes to managing technology. Responding quickly and if necessary with an "all hands on deck" response to a critical issue is appropriate when we are talking about mitigating business continuity risk.

Coach your team so they are "automatic" - You want your escalation procedures to take place automatically. Coach employees, inspect the process with simulated drills, and do what is necessary to get them handling escalation steps automatically; you will be glad you did when they have to escalate an issue.
64. Stability

Description:
An IT manager’s job is to ensure the technology of the company is stable and available for clients and users that need technology to do their jobs.

"Three legs of a stool" are required to create a stable technology environment: systems, staff, and processes. Any one of the "three legs" are missing and the technology environment is wobbly. Balance is key and each of the "three legs" must be in place and work with the other "two legs" to create a stable environment.

Key points:
- Technology stability requires firm foundations in three areas:
  - Systems
  - Staff
  - Processes
- Each "leg" must be stable and compliment the other two "legs"
- Technology stability is the first and foremost objective in managing IT
- Develop specific strategies to "firm up" each of the "three legs"

Category:
- IT Assessment
- IT Strategy & Planning
  - IT Project Management and Processes
- IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

One of the things we want to do is to create a very stable technology environment. To do that, envision your company as a stool with three components of technology that represent the legs of the stool. Three solid legs on a stool give the stool balance and a sturdy foundation. However, if any one of the three legs are unstable, the entire technology foundation can become unstable.

**Technology stability requires firm foundations in three areas** - Stable technology requires stability in three areas: systems, staff, and processes.

- **Systems** - Operating systems, networks, and business applications must be stable for a smooth running business operation. They all compliment one another and must work in harmony.
- **Staff** - A stable staff that is knowledgeable and knows how to support your systems is just as important as the systems themselves.
- **Processes** - Change management processes and other processes that support the success of your technology support operation are essential ingredients in creating a stable environment.

Each "leg" must be stable and compliment the other two "legs" - Every leg must be stable in itself and work to compliment the other two legs of the stool. Systems, staff, and processes must be balanced and work in harmony to maintain a stable technology environment.

**Technology stability is the first and foremost objective in managing IT** - Technology stability is one of the first objectives you should have in any new IT management position. Until you can create stability, you can't make a lot of progress.

**Develop specific strategies to "firm up" each of the "three legs"** - Focus on all three legs of the stability model concurrently to stabilize your technology environment. Each leg or aspect of technology stability should have a specific strategy to address that particular area. Attack any stability issues aggressively.
65. Scalability

**Description:**
Being able to scale up your technology components as your company grows is important. Building an organization and a systems architecture that is scalable without having to "rebuild" as you grow is essential to smooth growth.

Systems, organization, and your processes should all be addressed to ensure they are scalable as needed for company growth.

**Key points:**
- Build technology components with growth in mind
  - Systems
  - Organization
  - Processes
- Think long term
- Understand the cost/value proposition of future technology
- Adding before you have need is poor management

**Category:**
- IT Assessment
- IT Strategy & Planning
  - IT Project Management and Processes
- IT Organization and Staff
  - IT Financial Management
  - IT Measurements and Communication
Discussion:

Having technology components in place that are scalable and able to grow as your company grows will make your management job easier and more predictable. It will also be less painful for your company during growth periods.

Technology is getting more powerful and cheaper all the time so it's important to build an architecture where you can scale up but only have to purchase additional equipment and staff when the company actually needs the additional horsepower.

Build technology components with growth in mind - When you have the opportunity to add equipment or people, it will be a benefit later if you add them with growth in mind:

1. **Systems** - Always buy somewhat more capacity than you need. Buying just to meet today's need will keep you in a vicious "catch up" cycle if your company is growing.
2. **Organization** - When hiring, find people that can do more than one thing and that have many skills that meet your needs. People who are adaptable and skilled have many more opportunities as your company grows.
3. **Processes** - Implement processes that handle today's business issues but will also be effective in a bigger company.

Think long term - Think strategically and not just to meet today's demands. Position yourself to be proactive and not reactive by building architectures that allow you to layer on new technology and add depth to your staff as you need it.

Understand the cost/value proposition of future technology - Know that technology gets cheaper and more powerful every day. You want an architecture that allows you to take advantage of new technology at a lower price when you need it. Buy equipment that gives you breathing room but does not prevent you from purchasing it more cost effective by buying too much too early.

Adding before you have need is poor management - Adding too much capacity before your company needs it is poor management. You always want some excess capacity in your systems but there is a limit to how much you want to buy now versus later when the price drops, and based on history it will drop.
66. Reward Desired Behavior

Description:
In addition to rewarding for results, you want your team to recognize the desired behavior you need that promotes strong client service action, exhibits a professional and responsive organization, and positions the team for success.

Rewarding desired behavior allows you to acknowledge even the lowest paid person in your staff for exemplary behavior that leads to a successful outcome. It is important for managers to acknowledge and reward all levels within our organization, not just the superstars who have more skills and always accomplish more.

Key points:
- Rewarding desired behavior helps establish the right work culture
- Rewarding desired behavior allows you to reward every level employee
- Professional behavior that promotes client service is essential for success

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

You always want to reward success, but another way to achieve success is to reward the desired behavior you need in your organization to be successful. Rewarding desired behavior allows you to single out any employee in your organization, something that can be a powerful motivator for everyone.

Creating a culture where the behavior of everyone on the team contributes to positive client service and exhibits responsiveness and a conscientious approach to supporting the technology of the company is important in getting the most of your team.

**Reward desired behavior helps establish the right work culture** - Creating a team environment where everyone works well together, watches one another's back, and stays focused on the important issues is what managing any organization is all about. Rewarding behavior of those who exhibit "going the extra mile" for a client reinforces your emphasis on using strong client service skills in the job. What you reinforce and promote will replicate itself across the organization.

**Rewarding desired behavior allows you to reward every level employee** - Your employees work at different levels. Some are superstars and can accomplish much more than others. If you only recognize the successes of the organization, you will probably be handing out awards to just the superstars. This can actually be demoralizing for the other 80% of your team.

Rewarding people for exhibiting the desired behavior you want and need to function successfully as an IT organization gives you the ability to recognize anyone on your team. It can be a powerful motivator for all of your team and an effective management tool for you in managing your staff.

**Professional behavior promotes client service is essential for success** - How your people conduct themselves defines who you are as an organization. Professional behavior promotes client satisfaction and can be the difference in your organization's level of success.
**67. 0 to 180 in 30 days**

**Description:**
Getting off to a fast start in any new management position is one of the smartest things you can do. It establishes you early on as an achiever and leader who knows what to do and how to get things done.

Follow a simple process to create a fast start in your first 30 days in a new management role.

**Key points:**
- "Fast start" any new management role
- Follow a simple process to get started quickly:
  - 1 week assessment
  - 1 week analysis and issues definition
  - 1 week to turn your issues into project initiatives
    - 30-90 day tactical plan
    - Begin development of a 12 to 18 month strategy
  - 1 week to formalize the plan and to gain agreement on your strategy

**Category:**
- IT Assessment
- **X** IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

There is a "honeymoon" period with any new management position. Take advantage of this period of opportunity by getting started as quickly as possible. It will set the tone for your management style, something important for employees, clients, and senior management alike.

You don't have to solve everything immediately, but you do need to show action that says you are attacking the issues and starting to make quick progress.

"Fast start" any new management role - When you take a new management position, start fast and establish a quick track record of identifying issues and making things happen that provide value to your client and company.

Follow a simple process to get started quickly - You can use a simple process to help get yourself off to a fast start:

1. **1 week assessment** - Take one week to assess the client and business needs and issues that relate to your organization's responsibility.
2. **1 week analysis and issues definition** - Spend the second week analyzing the assessment data to determine the highest priority.
3. **1 week to turn your issues into project initiatives** - Translate the client and business issues into IT initiatives and projects that will address the issues.
   - **30-90 day tactical plan** - Some things need addressing immediately. These tend to be stability or client service types of issues.
   - **Begin development of a 12 to 18 month strategy** - After you start your tactical plan actions, you will need a more strategic plan that you will carry out the next 12-18 months.
4. **1 week to formalize the plan and to gain agreement on your strategy** - Present your plans to senior management for validation, "buy in", and commitment. I always develop two plans, a tactical 30-90 day plan that I will begin working immediately and I will begin developing a more strategic plan that will be presented to management once I have it ready.

You can go faster depending upon your situation and experience. A manager that starts showing immediate recognition of issues, plans an attack, and gains validation that his/her initiatives are in sync with company needs within the first 30 days on the job is going to be recognized as a proactive manager who starts fast and has a real plan.
68. Measurements

Description:
Targeted measurements can do a lot for your organization by quantifying results, defining progress, and pointing out needed improvements.

Any area that is important for managing technology resources effectively is a good candidate for creating specific measurements that tell you "the story".

Measure only the things that help you learn about your business or that can help you improve your technology support operation.

Key points:
- Target specific measurements that help you learn something or improve your operation
- Minimize the administrative burden to measure issues
- If the measurements do not provide value, stop
- Measurement areas to consider:
  - Quality
  - Responsiveness
  - Productivity
  - ROI
  - Actual results to expected benefits
  - Financial
  - Support activity
  - Contribution

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

The best way to learn what's going on in your technology support operation or whether you are making improvement is to have specific measurements that tell the story.

Collecting and reporting measurement data takes time and should be incorporated into your business operation judiciously. If the data can help you learn about your business or improve the supportability of your technology responsibility, you should find a way to use it.

Target specific measurements that help you learn something or improve your operation - Collect data that tells you something about how well your team is doing in supporting technology or that can point out areas that need improvement. Likewise, collect data that can quantitatively show improvement being made in important support areas of your business.

Minimize the administrative burden to measure issues - Minimize the work required to collect and report the data and measure the item you need to understand. If the administrative overhead is significant, see if there are alternative sets of data that are easier to get to that will give you the same benefit.

If the measurements do not provide value, stop - Stop collecting data and reporting the measurement if it isn't contributing to your ability to manage the operation better. Use the administrative time on more worthwhile areas.

Measurement areas to consider - Here are a few key areas of measurement you should consider as each category is important in managing it successfully:

1. Quality
2. Responsiveness
3. Productivity
4. ROI
5. Actual results to expected benefits
6. Financial
7. Support activity
8. Contribution
69. Understand the Business

Description:
To manage an IT organization effectively, it is important for you to understand your business and know where the company and industry "drivers" exist.

Every industry has business "drivers" or leverage points. Your ability to focus technology resources in a way to take advantage of these opportunity areas positions you and the organization for considerable success.

Understanding the business is important to be able to conduct an effective IT assessment.

Key points:
- Require all managers to understand the basics of your business
- Learn where company and industry leverage opportunities exist
- Business understanding positions you for partnerships with senior executives
- You will accomplish more when you understand business leverage points

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
- IT Financial Management
- IT Measurements and Communication
Discussion:

To be effective in any IT management role, it helps to understand your company’s business. This becomes more important as you are promoted into more senior level management positions. It is critical for a CIO.

Every industry has leverage points where technology can make a tangible difference in profitability. Learning what these leverage points are positions you in your IT management role to recognize issues and opportunities that provide value for your company.

Require all managers to understand the basics of your business - If you are a CIO, you should develop an understanding of the business with all your IT management team. The more they understand the business the more effective they will be in their management roles.

Learn where company and industry leverage opportunities exist - Every company and industry has leverage points where technology can make a tangible difference in profitability, productivity, competitiveness, or other important element of your company.

Discover where these leverage points are in your company and look for opportunities to apply technology to make tangible differences.

Business understanding positions you for partnerships with senior executives - Senior executives need managers that understand the pressure points of the business and can help them identify prudent investment opportunities that will make tangible differences in the company. CIO’s need to develop partnerships with the CEO and CFO of the company. You will never gain that partnership unless you learn about the business.

You will accomplish more when you understand business leverage points - Knowing where the business leverage points are positions you to achieve more success in your technology organization in areas that mean more for the company and provide the most value.
70. Effective Meetings

Description:
Long, boring meetings that provide little to no value are a waste of time. Effective meetings on the other hand are valuable tools to help you manage your technology resources.

Conduct meetings when needed to add value and only as often as required. Keep your meetings to the point by preparing an agenda, managing the discussions, and expecting participants to be prepared as appropriate for each session.

Key points:
- Make every meeting effective by providing value
  - Establish specific objectives
  - Prepare
  - Create an agenda
  - Invite only those who need to be there
  - Manage the discussions to keep the meeting "on point"
- Be considerate of everyone's time
- Start on time and end on time
- Stay focused to your purpose and have fun
- Follow-up with "to do's" and action items

Category:
- IT Assessment
- IT Strategy & Planning
- IT Project Management and Processes
- IT Organization and Staff
  - IT Financial Management
- IT Measurements and Communication
Discussion:

**Effective Meetings**

Meetings are tools that can help you focus your employees, motivate, even educate. However, meetings can also waste people’s time and do harm when not handled appropriately just like any tool.

Effective meetings are not that hard to do as long as you are willing to plan a bit, prepare, and target pertinent topics for discussion.

Use meetings to help you boost confidence and focus your staff on the important issues of your operation.

**Make every meeting effective by providing value** - If you don't have a purpose or need for a meeting, then don’t have one. Every meeting should have specific objectives that will help your organization do a better job. Otherwise, don’t waste everyone’s time.

To prepare for a meeting, consider the following:

1. **Establish specific objectives** - Target specific items to discuss that improve focus, educate, or motivate. After the meeting, do a self-check to assess whether you met your objectives.
2. **Prepare** - Nothing helps make a meeting a success like preparing for it. You will find the meeting will take less time, be focused, and stay on point.
3. **Create an agenda** - Create an agenda so everyone can follow the meeting’s progress and it will also help you stay focused.
4. **Invite only those who need to be there** - Only those who need to be there should be invited; you are wasting time and productivity having people attend that are not needed.
5. **Manage the discussions to keep the meeting "on point"** - Discussions tend to want to get off the point and take tangents. As meeting facilitator, you need to keep discussions focused to objectives of your meeting. You can take the miscellaneous discussions outside the meeting with just the few who are interested in it and protect the value of other people’s time.

**Be considerate of everyone’s time** - Protect everyone’s time including your own.

**Start on time and end on time** - Start and end on time so people can plan appropriately. Coach habitual late arrivals outside of the meeting time; they will also get the message when they have missed the first ten minutes of the meeting. Being late for meetings is inconsiderate of the others who have shown up on time.

**Stay focused to your purpose and have fun** - Have fun when you can while staying focused to the issues.

**Follow-up with "to do's" and action items** - Always follow-up on any "to do" items.
71. Performance Plans

Description:
Employee performance plans and reviews are excellent tools to help you maintain focus with individual staff members and teams.

Use a process that targets specific performance elements required for individual success and that contributes to the organization and company’s success.

Key points:
- Conduct performance planning and reviews at least annually
- Focus on specific areas that help the team and company be successful
  - Technical knowledge
  - Productivity
  - Client service
  - Teamwork
  - Process and standards
  - Communication
  - Education & training
- Performance planning and review sessions are quality time with an employee
- Use the sessions to coach and focus attention on important issues
- Document your performance plans and reviews
- Employees want and need to know how they are doing

Category:
IT Assessment
- IT Strategy & Planning
  IT Project Management and Processes
- IT Organization and Staff
  IT Financial Management
  IT Measurements and Communication
Discussion:

Employee performance plans and reviews are some of the most effective management tools you have as an IT manager. Our employees are mostly high detail oriented people. Detail oriented people need "the book" to know what to do and what it takes to be successful. If you don't give them one, many will develop their own. Performance plans are very effective in giving detail oriented people the guide they need to get their job done.

Conduct performance planning and reviews at least annually - People need formal performance plans and reviews at least annually to perform their best. It also forces you to have quality "sit down" time with your employee at least twice a year, something that is invaluable in managing their performance.

Focus on specific areas that help the team and company be successful - I usually focus on seven areas shown below. In each section, I list specific things the employee needs to do to be successful for that area. In all cases, the specific action steps are designed to help the team succeed in our technology support role.

1. Technical knowledge
2. Productivity
3. Client service
4. Teamwork
5. Process and standards
6. Communication
7. Education & training

Performance planning and review sessions are quality time with an employee - Try to spend at least a dedicated hour or more in delivering the plan and in the review session. It is quality time that can mean a great deal to the employee and work for the team’s benefit. It is an investment in your employee that you do not want to miss out on.

Use the sessions to coach and focus attention on important issues - Planning sessions and reviews are excellent opportunities to coach your employee on issues that help them be more focused and successful.

Document your performance plans and reviews - Always document your plans and reviews with a copy to HR, a copy to your employee file, and one to the employee.

Employees want and need to know how they are doing - Detail oriented people such as your IT staff have an innate desire to know how they are doing and what they need to do to become more successful. Performance planning and review sessions are tools that address these needs very effectively.
72. "Bubble" Effect

Description:
In a company "needs improvement" situation, IT may need to spend more in the short term to get quick improvements, even if you are already spending too much already.

The "bubble effect" is a good tool to show senior management the effect of spending more to "fix" or improve a technology support situation.

When they agree to go with your plan, use this chart frequently to remind them of the financial pain the company will need to endure while IT spends more to resolve key issues.

Key points:
- Improvements are usually achieved with a cost
  - We spend more to achieve specific objectives quickly
  - Over time the IT expense as a percent of revenue will actually decline
  - The "bubble period" is a financial challenge for the company
- The "bubble" effect is painful for the company
- Remind senior managers often of the objectives targeted and the financial commitment required

Category:
- IT Assessment
  ✗ IT Strategy & Planning
  IT Project Management and Processes
  IT Organization and Staff
- IT Financial Management
  IT Measurements and Communication
Discussion:

I have used the "Bubble Effect" model several times when needing to spend more money in IT to address problems that I inherited. It can be an effective tool and one that helps you manage senior management's expectations.

This model says we are going to spend more money for technology in the short run that will have a "peak bubble effect" in IT expense as a per cent of revenue. It may be needed to fix critical technology issues, position the company for planned growth, or address an issue of "past sins" where the company failed to invest in technology to the extent needed to support the company.

**Improvements are usually achieved with a cost** - When we need to improve the technology of a company, it almost always has a price tag.

**We spend more to achieve specific objectives quickly** - There are times when we need to spend more now to achieve significant results quickly.

**Over time the IT expense as a percent of revenue will actually decline** - Over time, the IT spending will come back in line, possibly even decrease as a percentage of revenue below what it is today.

**The "bubble period" is a financial challenge for the company** - During the time the "bubble" exists will be a challenging period for the company. For example, if the company is marching along at 12% profitability and you need to spend 3% more of revenue in IT, that 3% has to be recovered elsewhere in the company to maintain the 12% profitability level.

**The "bubble" effect is painful for the company** - Spending more than normal as a percentage of revenue is painful for the company and its senior management team. However, it is an investment that will hopefully make the financial road easier later on.

**Remind senior managers often of the objectives targeted and the financial commitment required** - Senior executives can forget about the reasons we are spending more in IT when they start receiving monthly financial reports. The bottom line is that our spending, no matter how justified, still places severe financial pressures on the company. Show them the "bubble effect" model often to remind them of what's happening and why we are all going through the pain.
VII. IT Management Models Category Summaries

The IT Management Models Category Summaries include all the models that are related to each management discipline we defined into categories. The following pages may be printed out and filed into your notebook for quick and easy access.

Once you become familiar with the individual models, the summary sheets will become quick prompts as you need to reference them when dealing with certain management issues.

One of the nice things about providing the models in Adobe PDF format is being able to print them out in color. You will find the summary sheets to be very handy items.

The Summary Sheets are provided in the following categories:

A. IT Assessment
B. IT Strategy and Planning
C. IT Project management and Process
D. IT Organization and Staff
E. IT Financial Management
F. IT Measurements and Communication
### A. IT Assessment - part 1

<table>
<thead>
<tr>
<th>IT Assessment Focus</th>
<th>Understand the Business</th>
<th>Pressure Points</th>
<th>IT Project Priority Hierarchy</th>
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<tr>
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<th>Observe</th>
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<th>Problems are Opportunities</th>
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<tbody>
<tr>
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<td>49</td>
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<table>
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<th>Disaster Recovery</th>
<th>Backup</th>
<th>Stability</th>
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<tbody>
<tr>
<td>51</td>
<td>53</td>
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## A. IT Assessment - part 2

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<thead>
<tr>
<th>Scalability</th>
<th>Experts &amp; Depth</th>
<th>Management Layers</th>
<th>Measurements</th>
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<th>Change Facilitator</th>
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**B. IT Strategy and Planning - part 1**

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<td>What Goes Around Comes Around</td>
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<td>Ready - Aim - Fire</td>
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<td>22</td>
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<td>Drain the Swamp</td>
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B. IT Strategy and Planning - part 2

<table>
<thead>
<tr>
<th>In Sync</th>
<th>2 Birds with 1 Stone</th>
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<th>5 Pound Sack</th>
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<td>32</td>
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Management Basics
- Assess
- Quantify
- Prioritize
- Plan
- Implement

Do the Right Thing
- Do right things over do things right

Change Facilitator
- Technology

Manage Expectations
- Quantify issues
- Gain agreement
- Present plan
- Deliver what & when
- Overcommunicate

Help Desk

Scalability

Stability

Uptime is King

Uptime

Disaster Recovery

Backup

Think Out of the Box

Bubble Effect
## B. IT Strategy and Planning - part 3

<table>
<thead>
<tr>
<th>Experts &amp; Depth</th>
<th>Lines of Fire</th>
<th>Key New Hire</th>
<th>Focus</th>
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<tbody>
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<th>Performance Plans</th>
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- **Technical Knowledge**
- **Productivity**
- **Client service**
- **Teamwork**
- **Process & standards**
- **Communication**
- **Education & training**

**Focus**

- Invest in Yourself
- Opportunity
- Capital
- Opportunity

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### C. IT Project Management and Process - part 2

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### D. IT Organization and Staff - part 1

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<thead>
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<th>Lines of Fire</th>
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### D. IT Organization and Staff - part 2

<table>
<thead>
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<th>Snails Crawl; Birds Fly</th>
<th>2 Birds with 1 Stone</th>
<th>The Main Thing is Not to Get Excited</th>
<th>Invest in Yourself</th>
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<tbody>
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<th>Verify References</th>
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<th>Manage Expectations</th>
<th>Follow-up</th>
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<th>Set the Tone</th>
<th>Listen</th>
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D. IT Organization and Staff - part 3

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<th>Performance Plans</th>
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| ![Effective Meetings](70) | - Technical Knowledge  
- Productivity  
- Client service  
- Teamwork  
- Process & standards  
- Communication  
- Education & training |

| 70 | 71 |

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## E. IT Financial Management

<table>
<thead>
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### F. IT Measurements and Communication

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VIII. New Models Template

Included on the next two pages is a blank template to assist you in creating new IT management models of your own. If you care to share them, let us see what you come up with by emailing your new models to mike@mde.net and telling us how you apply them.

Best of success.
Key points:

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Category:
IX. IT Management Models Reference Index

The next two pages provide an index of the models for quick reference. Models are listed in numerical order with reference to the page number. Management category groups are checked that are appropriate for each model.
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