

IT Strategic Plan Development Guide

Align business objectives and technology to create a dynamic IT plan

An IT Strategic Plan is a living document developed by IT in collaboration with leadership and all business units. To effectively leverage technology to accomplish business goals, it is crucial for organizations to first align technology initiatives and strategies with their mission, vision, and business objectives.

What is an IT Strategic Plan?

An IT Strategic Plan describes an organization's approach to aligning their technology initiatives and strategies with their mission, vision, and business objectives. Having a strategy for IT helps to ensure that your organization's current and future technology support your business goals.

However, your IT strategy should take much more into account than just the technology. A good strategy also accounts for how technology affects your organization's customer base, staff, and business processes. For example, your IT strategy should account for factors outside your infrastructure, such as customer and staff user experience, staff competency in your organization's platforms, and relationships with vendor partners (see Figure 1). It's important to consider how technology impacts each of these aspects of your organization.

As technology has evolved and permeated every facet of business, the role that IT plays within an organization has become more complex. It's no longer feasible for an organization to treat its IT department as merely a supporting character. In today's world, IT should be part of the conversations an organization has about its business at every stage. They should be involved in developing business objectives, identifying desired outcomes, and evaluating the overall health and success of the organization. The IT Strategic Plan provides an avenue for precisely this by aligning an organization's technology with its business and involving IT from the get-go.

While your IT Strategic Plan should be customized to cater to your specific needs, there are several components that are necessary to a successful plan. Your IT Strategic Plan should include a statement detailing the organization's purpose, an outline of the organization's business requirements, a description of the organization's current state, and a description of the future state the organization intends to achieve.

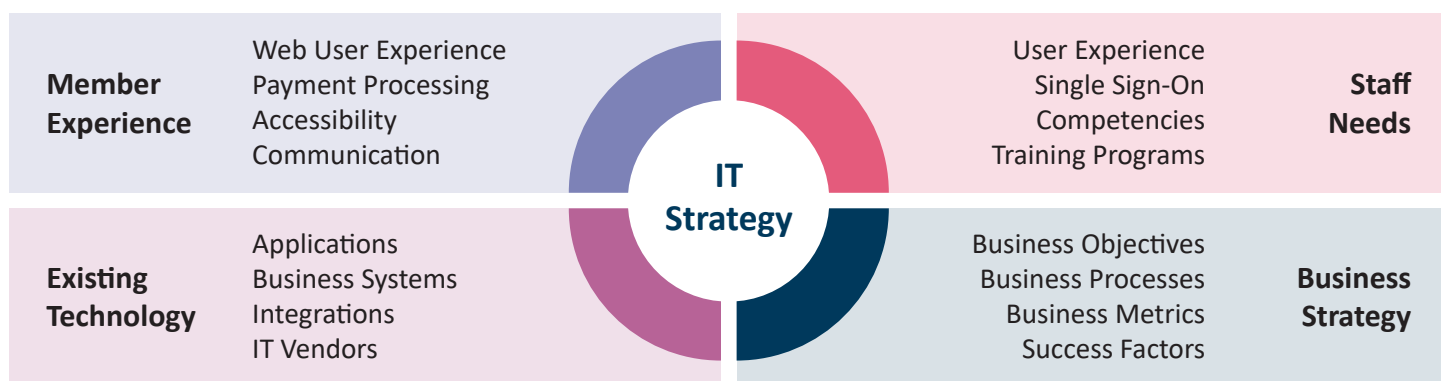


Figure 1. An organization's IT strategy should take into account the member experience, staff needs, existing technology, and the organization's overall business strategy.

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What will make for a successful plan has as much to do with the process by which it is created as it does with the content of the document. An IT Strategic Plan is not the kind of document that should be created by one department. Neither the IT department nor leadership should create this document in isolation. Rather, the IT Strategic Plan should be created collaboratively across the whole organization to ensure that it adequately captures the organization's purpose as well as the intricacies of the business processes and business needs of each department (see Figure 2 below).

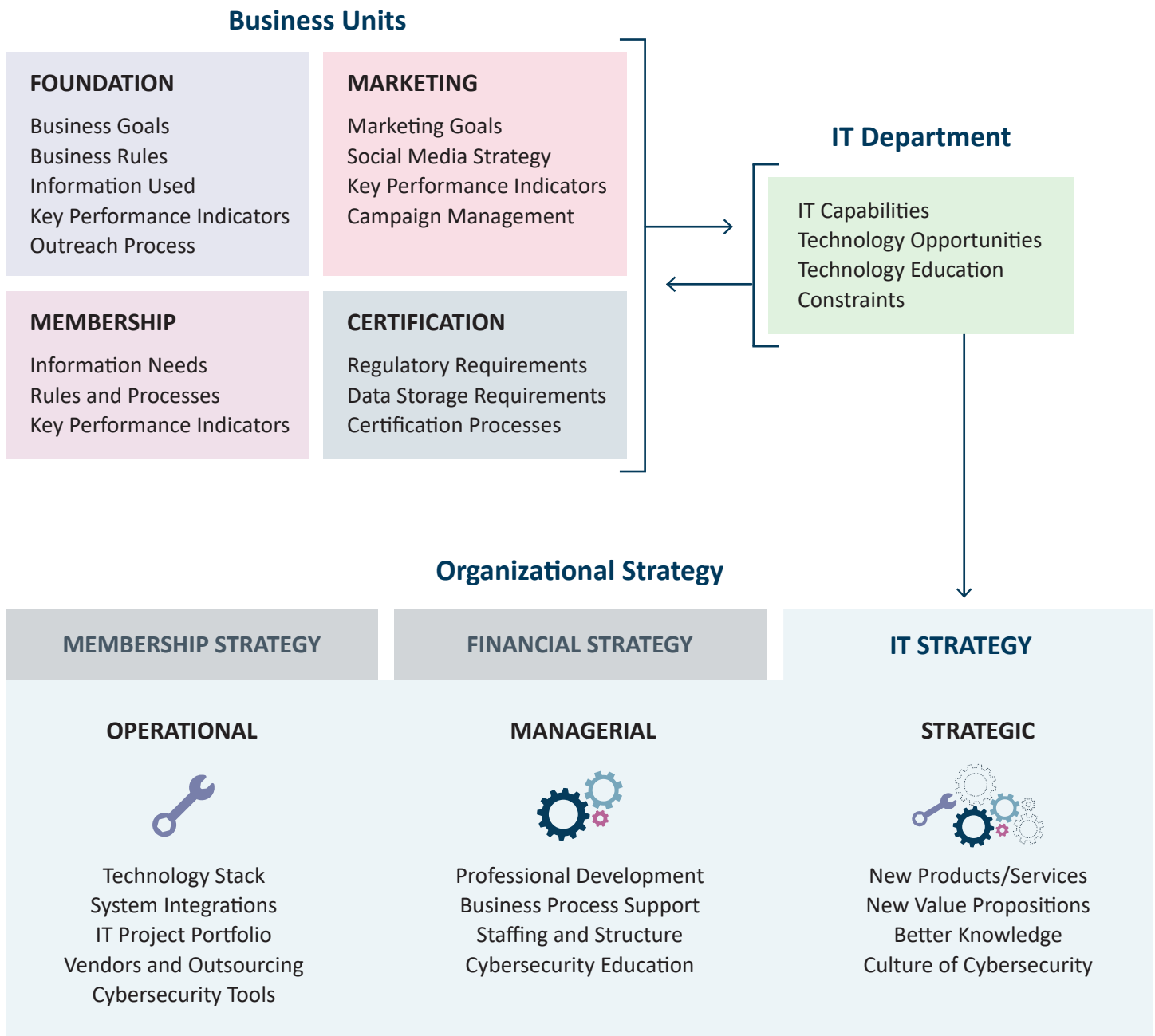


Figure 2. An organization's IT Strategic Plan should start with a collaborative discovery process. The organization should then use that information to develop a comprehensive IT strategy that includes all operational and strategic aspects of technology.

What is the value of developing an IT Strategic Plan?

These days, technology has become completely integral to business. With very few exceptions, the business of an organization depends on IT, and organizations that fail to recognize this miss opportunities to bolster their business. As business has become completely dependent on technology, leadership's responsibilities have become more complex.

The modern IT leader has to take some ownership of the organization's business strategy. Just as the marketing leader has to possess some level of expertise in technology, the IT leader has to possess an understanding of the organization's business needs and goals. In truly successful organizations, the IT leader plays a strategic role and is involved in shaping and establishing goals. A mature organization doesn't treat IT merely as a tool to support its business strategy because it understands the value that an IT leader can provide to shaping the organization's business strategy.

An IT Strategic Plan informs the decisions an organization makes about how to invest in technology and ensures that those decisions serve both the organization's overall business objectives and the needs of each division of the organization (see Figure 3). The right technology strategy affects whether you can provide the proper experience for your membership or customer base and the right infrastructure for your staff. Without a well-thought-out plan, your organization's investment may not support your goals and needs.

The IT Strategic Plan also provides an opportunity for your organization to better understand itself. As mentioned above, it's important to develop your IT Strategic Plan collaboratively with your organization. The process of creating the plan provides an organization the opportunity to understand itself and its vision for the future. Through the collaborative discovery process, organizations gain a 360-degree view of their entire business as they learn the objectives and needs of the different business units, as well as how they must align themselves in order to fully support each department.

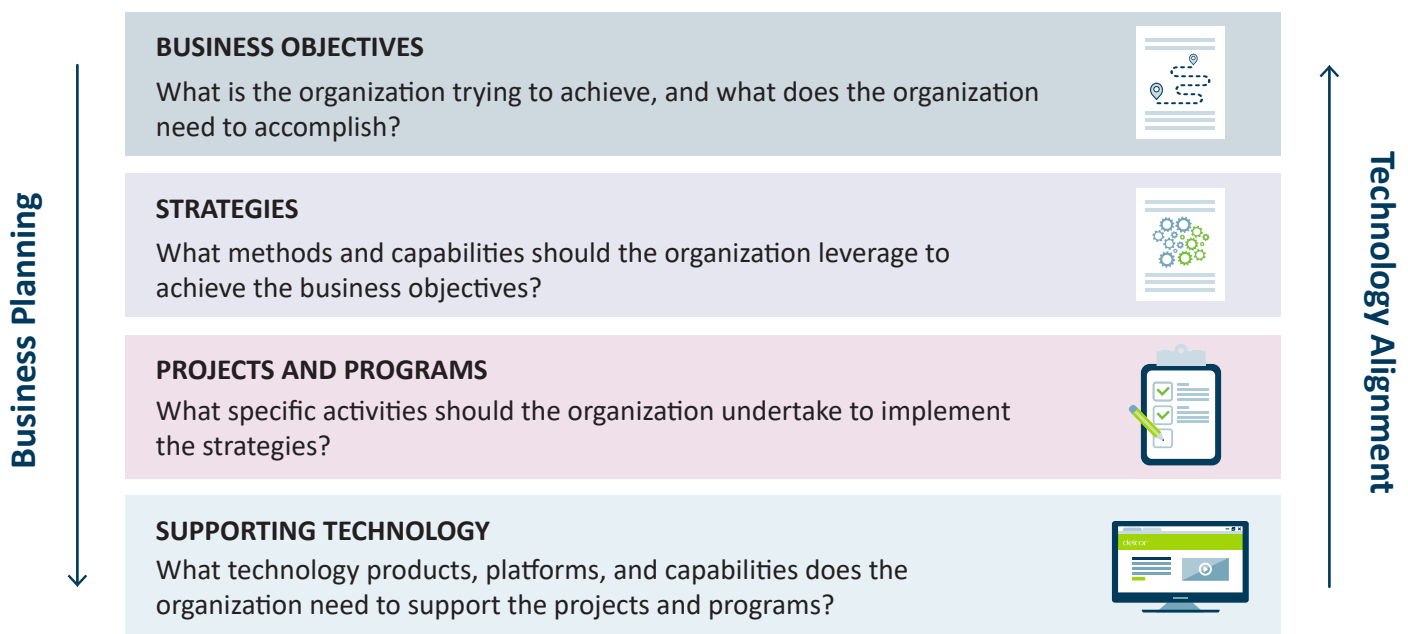


Figure 3. Leadership should establish business objectives that guide the organization's strategic use of technology, and then IT should plan for technology that supports the organization's projects and programs.

Who should create the IT Strategic Plan?

We've already emphasized that the IT Strategic Plan is a document that should represent the organization as a whole; it shouldn't simply be IT's perspective on what's required to support the organization's business objectives. Part of what makes the IT Strategic Plan valuable is that it serves as a catalyst for organizations to develop interdepartmental connection and understanding about each unit's business objectives and priorities. It is precisely because no single entity is wholly responsible for the creation of the document that it provides this value. Each business unit contributes time and resources to the production of the document so that it accurately reflects the needs, challenges, and priorities of the whole organization.

That being said, it's important to identify the responsibilities of the different units within the organization. While IT should own the document and move it along, they should collaborate with other units as necessary throughout each stage in the process. Given the unique challenges of cross-organizational collaboration, leadership needs to support IT in their efforts to shepherd this process. Leadership should convey a clear message to the rest of the organization highlighting the importance of this project and incentivizing participation into the creation of the IT Strategic Plan. To create an effective plan, each business unit needs to contribute their insights into what their procedures require and what their objectives are.

It's necessary at the onset of the process to define the various stakeholders involved in the production of the IT Strategic Plan so that clear expectations can be set for who is responsible for what. In addition to identifying who should be involved, it can be helpful to identify all the different groups that will be affected by the organization's IT strategy. Not only should these considerations be included in the IT Strategic Plan, but it may also be beneficial to include a responsibility assignment (RACI) matrix to guide the process of creating the plan.

What are the steps required to create and maintain an IT Strategic Plan?

An IT Strategic Plan is never *done* done; it's an ever-evolving and growing document that should be updated as your business grows and as your needs change. That said, there are several important steps you can take to produce an IT Strategic Plan for your organization, and you should revisit some of these steps as you continue to update your organization's plan (see Figure 4).

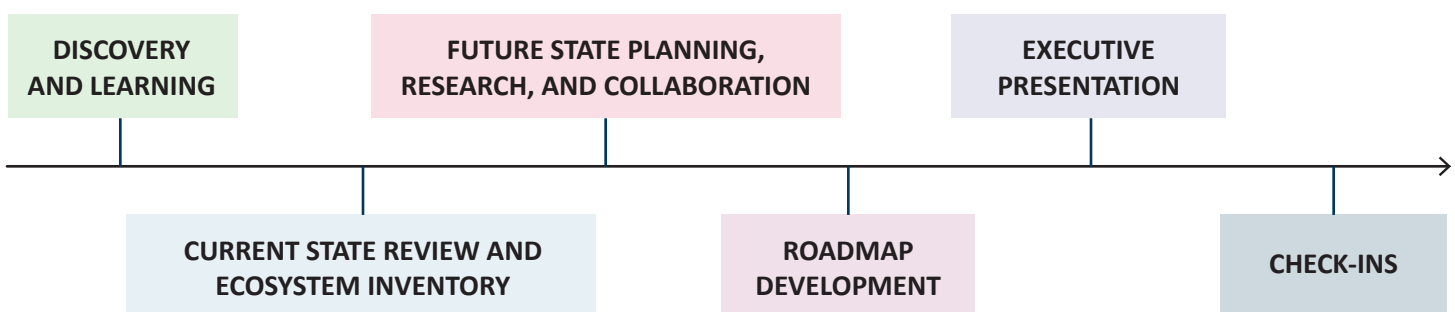


Figure 4. The process to develop an IT Strategic Plan has no end. Staff should conduct discovery, review the current state of technology, plan for the future state, develop a roadmap, present the roadmap to executives, and then conduct ongoing check-ins.

Discovery and Learning

To create an IT Strategic Plan, start by reviewing your organization's business strategy and factors for success. The IT department needs to fully understand the mission that drives the organization in addition to the business objectives that ground all the work. They also need to understand the factors for success for the organization as a whole, as well as for the individual business units. We call this first phase the learning phase, and it can be more difficult than it might seem at first glance. Business objectives and factors for success are big, overarching concepts and they can be difficult to pin down, especially across departments.

We recommend that your IT plan reflects the results of this discovery process through the inclusion of a purpose statement and a description of your organization's business requirements. You can expand on the level of detail you include in your plan to meet your needs by including a background section that provides context for your organization's current state or for the IT plan itself. The following are examples of what might go into the background section:

- Culture
- Constraints
 - Financial
 - Culture
 - Capacity
 - People resources/time
- Current technologies
- Industry forces
 - Internal forces that affect the association (e.g., association management practices/community)
 - External forces that affect the membership
- Decision-making processes (i.e., how will IT decisions be made?)
- Decision-making criteria
- Technology trends

Note that the stakeholder descriptions and RACI matrix should be developed as part of this first phase.

Current State Review and Ecosystem Inventory

Alongside the learning phase, it's also necessary to inventory all of the systems that make up your business systems ecosystem. For each system, you need to identify at least the following:

- Core purpose of the system
- Who owns the system
- What the owner is responsible for
- What IT is responsible for
- Current integrations
- Various technical specifications where appropriate (e.g., product name, version, and hosting location)
- How each system aligns with your current business objectives and business strategy

In doing so, you should gain an understanding of what your systems are supposed to do, how they function within your organization, and how they support your business.

The ecosystem review is crucial to creating an IT Strategic Plan that suits the particular needs of your organization. As a result, it's important to try to be exhaustive with the level of detail included in this inventory. We've highlighted some of the key aspects of what should go into your ecosystem review, but you will also need to consider the size of your business systems ecosystem, the types of systems you use, and the complexity of your business operations as you conduct this review.

Future State Planning, Research, and Collaboration

After reviewing your organization's current state during the learning phase and the ecosystem inventory phase, you need to identify what your desired future state looks like. The level of difficulty of identifying your desired future state will depend on a variety of factors including the results of the discovery process, the complexity of your business systems ecosystem, and the nature of your business processes.

We call this phase the research and collaboration phase because you'll need to identify what systems, technologies, protocols, or training you'll need to implement in order to support your business as you move towards your desired future state. Additionally, you will need to collaborate across your organization to set priorities, understand success factors, and educate staff on technological capabilities.

You will also need to identify factors that may affect the implementation of your initiatives so that you can prioritize those initiatives. It's difficult to describe what this will look like for your organization because you may find you simply need to update some of the peripheral technologies you use, or you may find you want to make improvements that have a greater scope and impact.

Roadmap Development

Your research should provide the foundation to create a technology roadmap that prioritizes the steps your organization will need to take in order to realize that desired future state. Your roadmap will be what serves the actual guiding function of the IT Strategic Plan that you create, so it's important to ensure that you've done the prerequisite work in the previous phases properly (see Figure 5).

DATA-RELATED PROJECTS	TIMELINE	IMPACT	LOE	RESOURCES
Data Inventory	Q1	Medium	Medium	Steering Team
Data Definitions Development	Q1-Q2	Medium	Medium	Steering Team
Data Governance Improvement	Q2-Q3	High	X-Large	Consultant
Dashboard Development	Q4	High	Large	IT Department
Data Analytics Augmentation	Q1-Q2	High	Large	System Vendor

Figure 5. A project portfolio and roadmap should list the recommended initiative as well as the projected timeline, impact, level of effort, and required resources.

It may be beneficial to consult outside resources and technical experts to bridge some gaps in your internal resources; your plan will only be as effective as the work that went into creating it. As part of The 501(c) IT Maturity Model (ITMM), we have worked with many associations to develop technology roadmaps—or as we call them, Technology Alignment Portfolios—and we’ve seen from experience the benefit of collaborating with experts across a variety of departments and fields to produce the most impactful plan. The level of detail you employ in your roadmap doesn’t need to be exhaustive, but you should consider including details that can help your organization understand the big picture of how you intend to invest in technology over the next two to five years.

The structure of your roadmap is going to be largely dependent upon how your organization’s overall planning and execution process runs. Some organizations may find value in a more thorough document and as a result may include a background, information about the relevant technologies and platforms that may be of interest, and a rationale for their roadmap. Other organizations may simply provide the plan without a background or rationale. See our sample framework for an idea of what sections your plan might include.

Executive Presentation

Your plan will need executive support and buy-in. It is a good practice to create a summary version of the plan in a presentation format so it can be shared easily with internal and external executive stakeholders. While the volunteer and the elected leadership should not be involved at the detail level, they should be able to easily see how the organization’s strategic plan connects with the technology strategy and budget.

Check-Ins

As stated earlier, your organization’s IT Strategic Plan is never fully complete; it is a document that should evolve and grow alongside your organization. There are many factors that affect not only how successful your business will be, but also how you align your priorities. The last few years have demonstrated some of the more extreme ways in which unforeseen circumstances can affect how we do business. As a result of the COVID-19 pandemic, we saw a drastic shift in how organizations in the association space had to conduct their business. Many organizations shifted to working remotely, holding meetings and conferences virtually, and adapting other aspects of their business to meet the slew of new challenges they were facing.

Even outside of such extreme circumstances, your business needs and priorities will change based on new technologies, new developments in the association space, and the ever-evolving set of challenges that affect your mission. These changes naturally have correlating changes in organizational strategies such as the IT Strategic Plan. You need to continue to revisit the plan, adjusting and revising to maintain a plan that’s responsive to your business. As such, it’s important to standardize checking in on the process every six months.

Check-ins also give the team an opportunity to evaluate the established priorities. As new opportunities evolve, the team may give IT a different perspective on the organization’s priorities. The plan shouldn’t change often, but advancing one initiative over another or establishing a new priority may be an important part of an organization’s response to particular events or changes in an industry that were not anticipated.

What should be included in an IT Strategic Plan?

We hope it's clear how important it is to make sure that your organization has a well-thought-out IT Strategic Plan. It is an essential part of what helps an organization invest in technology wisely and effectively, and it can be a valuable tool for optimizing an organization's business all-around. But as we've stressed, there's no one size that fits all. Your IT Strategic Plan will need to be tailored to your organization's business, technology, and operational needs. As a result, developing a plan is not as simple as filling out a template; you'll need to take all the steps outlined above and do your due diligence in order to develop a plan that is effective.

We've provided a checklist that can bring value as you begin to develop or review your organization's IT Strategic Plan. It's important to remember that your organization may not need or want to include each section listed below, but we've indicated which elements we think are essential (see Figure 6).

ESSENTIAL SECTIONS

Purpose Statement: Explanation of how the IT Strategic Plan will be used and why it was created

Scope: Overview of the information gathered as part of discovery

Decision-Making Process: Explanation of how IT decisions will be made

Technology Initiatives: Outline of the scope, level of effort, impact, priority, dependencies, duration, and resources required to complete the technology projects that are planned and designed to achieve organizational and department goals

ADDITIONAL INFORMATION

Stakeholder Group: List of staff that need to be involved and have a stake in the plan's outcome and execution as well as the group objectives

RACI Matrix: Outlines the participants' responsibilities during development and execution

Additional Scope Information:

Organization Information: Mission, business objectives, current strategic plan, initiatives, culture, constraints (financial, culture, capacity, people resources/time)

Technology Information: Current technologies, general technology trends, and decision-making criteria

Industry Forces: Internal forces that affect the association and external forces that affect the membership

Figure 6. The sample framework includes both essential sections that should be included in an organization's IT Strategic Plan and recommendations for additional details that will provide further context for the planned technology initiatives.

Questions? Contact us.

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