

Info-Tech Research Group

# Service Overview

INFO~TECH  
RESEARCH GROUP

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## About Us

Info-Tech Research Group is the world's fastest growing information technology research and advisory company, proudly serving over 30,000 IT professionals.

We are, by far, the most innovative firm in the industry and we pride ourselves on providing better research than anyone.

Since 1997, we have been helping CIOs and their teams evolve from fire fighters to innovation champions.

We produce unbiased and highly relevant research & tools to help IT leaders make strategic, timely, and well-informed decisions that drive business value.

We partner closely with IT teams to provide everything they need – from actionable tools to in-person analyst guidance – to deliver measurable results for their organizations.

## Info-Tech Advantage

Our data-driven programs enable IT leaders to objectively measure success, develop an impactful IT strategy, and systematically improve performance year over year.

Each year we invest millions of dollars in our library of best-practice tools, templates, training materials, and step-by-step methodologies that are proven to accelerate projects and transform IT departments.

For over 20 years, our team of 100+ world-class analysts has been coaching members through their most challenging projects and largest technology selection decisions.

Why start your next project from scratch when you can leverage known best practices and make your job easier.

A STEP BY STEP

# PROGRAM TO SYSTEMATICALLY IMPROVE IT PERFORMANCE

Info-Tech provides  
best-practice research  
making your job easier.

- ▶ Tools & Templates
- ▶ Step-by-Step Methodologies
- ▶ Benchmarking & Diagnostic Programs
- ▶ Training & Executive Coaching
- ▶ Insights & Advice from 30,000+Peers

01 MANAGE AND IMPROVE

**Core IT Processes**

02 FASTER AND MORE EFFECTIVELY COMPLETE YOUR

**Technology Projects**

03 TRAIN AND DEVELOP YOUR

**IT Leadership Team**

04 BUILD A DATA-DRIVEN

**IT Strategy**

05 A STEP-BY-STEP PROGRAM TO

**Systematically Improve IT**

MANAGE AND IMPROVE

# Core IT Processes

**Includes:**

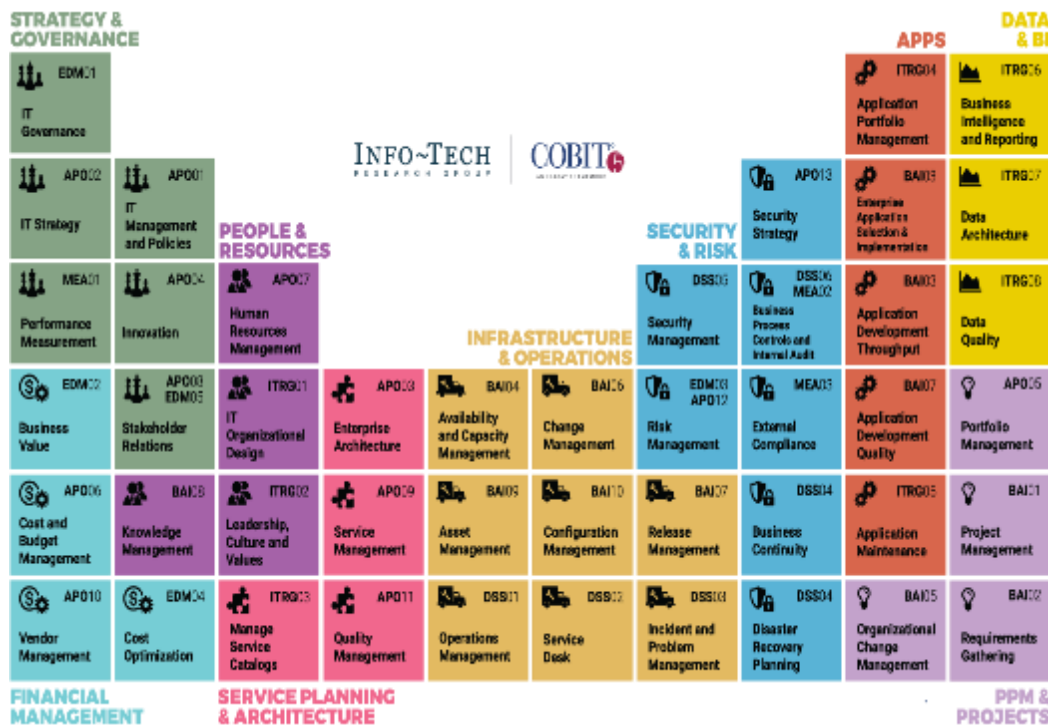
- Management & Governance Framework
- Management & Governance Diagnostic
- Process Optimization Research



# Manage and Improve Core IT Processes

Building core IT processes is the single most important component of any IT manager's job. The overall success of an IT department will depend on the strength of its underlying core processes. Improving your processes means that you spend less time fighting fires and more time delivering exceptional business value.

## IT Management & Governance Framework



Based on COBIT 5, our IT Management and Governance Framework is a comprehensive and connected set of 45 core IT processes.

Use this framework to measure process maturity, identify the most critical processes, and assign process owners.

Each element within the framework contains a detailed set of materials and tools to help you implement best practices and improve each core IT process.

The processes are divided across the nine key areas of an IT department:

- ▶ Strategy & Governance
- ▶ Financial Management
- ▶ People & Resources
- ▶ Service Planning & Architecture
- ▶ Infrastructure & Operations
- ▶ Security & Risk
- ▶ Applications
- ▶ Data & Business Intelligence
- ▶ PPM & Projects

# Management & Governance Diagnostic

An IT process effectiveness and importance assessment distributed to the entire IT department to build consensus and focus improvement efforts across 45 critical IT processes.



The difference between an IT department in firefighting mode and a business partner is strong core processes.

## We Help You:

- 01** **Map your process landscape.** Determine which processes your team believes need more attention so you can effectively allocate resources.
- 02** **Explore each process.** Dive deeper into process performance. Highlight contentious areas and understand how aligned your team is.
- 03** **Build team alignment.** Use the results to facilitate an alignment exercise with the team. Build consensus by exploring opposing views.
- 04** **Ensure ownership & accountability.** Assign process ownership and hold team members accountable for process improvement initiatives.

# 45 Methodologies to Optimize IT Management and Governance

Comprehensive, connected toolkits for improving and optimizing core IT processes.

We offer 45 do-it-yourself project blueprints, designed to help our members save time and money when tackling their most important IT initiatives. Every best-practice blueprint uses the critical insights uncovered in our comprehensive research process to give you the roadmap to solving your IT problems.

- 01** Practical step-by-step advice from project initiation to execution
- 02** Professional tools and templates to help you complete key project deliverables
- 03** Unique insights that challenge the conventional approach to IT projects



## EXAMPLE PROCESS

### Optimize the Requirements Gathering Process

#### Phase 1

Capture a clear understanding of the target needs for the requirements process.

- Requirements Gathering SOP
- Project Complexity Calculator

#### Phase 2

Develop best practices for conducting and structuring elicitation of business requirements.

- Requirements Documentation Template

#### Phase 3

Standardize frameworks for analysis and validation of business requirements.

- Requirements Gathering Checklist
- Requirements Analyst Job Description

#### Phase 4

Formalize change control and governance processes for requirements gathering.

- Requirements Traceability Matrix



MANAGE AND IMPROVE **CORE IT PROCESSES**

# IT Metrics Dashboards

A series of live dashboards for measuring and managing key metrics across each IT process.

## Manage & Measure Your Team's Results in One Place

- 01** **Manage Performance Across IT.** Get Dashboards across 9 IT areas to track key satisfaction & operational metrics across 45 IT processes
- 02** **Delegate to Your Team.** Use team-level access to keep your IT managers accountable for tracking key metrics to streamline performance management.
- 03** **Pick Areas and Metrics that Matter.** Fully customize areas, processes, and metrics tracked so that they fit your IT Organization
- 04** **Inform the Business.** Download and share the Scorecard as a PDF with your extended team or business stakeholders.



FASTER AND MORE EFFECTIVELY COMPLETE

# IT Projects

**Includes:**

- IT Project Research
- Role-Based Research
- Tools & Templates
- Technology Selection Research
- Software Reviews Program
- Contract Review Service
- Industry Research
- Trends & Predictions Notes

# Faster and More Effectively Complete Technology Projects

Top IT leaders leverage best practices before they start a project, not after they learn the hard way.



## Technology Selection Advice

We collect and analyze the most detailed reviews on enterprise software. Our data from real IT leaders will give you an unprecedented view into products and vendors before you buy. Evaluate products with our vendor satisfaction and rankings reports and confidently select your vendor.

- 01 Learn from the collective knowledge of real IT professionals
- 02 Know what to expect before you sign the contract
- 03 Evaluate market leaders through vendor rankings and awards

## Contract Review & Negotiation

Our contract review and vendor management services help you assess, manage, and reduce costs while strengthening vendor relationships throughout your technology supply chain. We have identified over \$100 million in savings through our Contract Review Process for our members.

- 01 Right-size your purchase volume to avoid buying licenses you don't need
- 02 Save thousands of dollars on your most expensive technology contracts
- 03 Correct vendor-slanted terms and conditions

## IT Project Support

We offer 450+ do-it-yourself project blueprints, designed to help our members save time and money when tackling their most important IT initiatives. Every best-practice blueprint uses the critical insights uncovered in our comprehensive research process to give you the roadmap to solving your IT problems.

- 01 Practical step-by-step advice from project initiation to execution
- 02 Professional tools and templates to help you complete key project deliverables
- 03 Unique insights that challenge the conventional approach to IT projects

FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# IT Project Research

We offer over 450 do-it-yourself project and process blueprints, developed by our industry experts to help our members save time and money when it comes to tackling their most important IT initiatives. Every best-practice blueprint uses the critical insights uncovered in our comprehensive research process to give you the roadmap to solving your IT problems. Each blueprint can be accompanied by a guided implementation that provides you access to our world-class analysts to help you get through the project.

## 01 Deliverable Focused

Not just the what, but also the how. Every blueprint comes with a set of easy-to-use tools, templates, and instructions to help you execute effectively.

## 02 Insight from IT Professionals

Our member base of 30,000 doesn't only inform our research but validates it through thousands of client experiences each year.

## 03 Data Focused

Everything we do – from our research to the deliverables we build – is based on data-driven principles that will help you push forward with your key IT projects.

### EXAMPLE PROJECT

## Create a Right-Sized Disaster Recovery Plan

### Phase 1

Create a DRP pilot project charter



DRP Project Charter Template



DRP Workbook

### Phase 2

Identify key applications and dependencies



DRP Business Impact Analysis Tool

### Phase 3

Identify projects to close gaps and mitigate risks



DRP Project Roadmap Tool

### Phase 4

Document your incident response plans



DRP Incident Response Management Tool



Severity Definitions and Escalation Rules Template

### Phase 5

Roll out the DRP to remaining apps



DRP Pilot Results Presentation Template



# Role-Based Research



## CIO

### People & Leadership

- Attract & Select
- Engage
- Lead
- Leadership & People
- Manage & Coach
- Train & Develop

### Strategy & Governance

- IT Governance, Risk & Compliance
- IT Strategy
- Organizational Design
- Service Management
- Cost & Budget Management
- Innovation

### Value & Performance

- Manage Business Relationships
- Performance Measurement
- Program & Project Management



## Applications

### Application Development

- Architecture & Strategy
- Development
- Maintenance
- Mobile Development
- Requirements & Design
- Testing, Deployment & QA

### Enterprise Applications

- Customer Relationship Management
- Enterprise Resource Planning
- Human Resource Systems
- Marketing Solutions

### Business Processes

- Business Analysis
- Optimization
- Selection & Implementation



## Infrastructure & Operations

### I&O Process Management

- Asset Management
- Availability & Capacity Management
- Operations Management
- Strategy & Organizational Design

### Operations

- DR & Business Continuity
- I&O Finance & Budgeting
- Service Desk

### Networks & Data Center

- Availability & Performance Management
- Cloud Strategy
- Data Center & Facilities Optimization
- Data Center & Facilities Strategy
- Network Management
- Server Optimization
- Storage & Backup Optimization

### End-User Computing

- Disruptive & Emerging Technologies
- End-User Computing Applications
- End-User Computing Devices
- End-User Computing Strategy
- Voice & Video Management

## Vendor Management

### Evaluation

- Infrastructure Vendor Landscapes
- Security Vendor Landscapes
- Applications Vendor Landscapes

### Strategy

- Vendor Management

### Software Reviews

- CIO
- Infrastructure & Operations
- Enterprise Architecture
- Applications
- Project & Portfolio Management
- Data & Business Intelligence
- Security



## Data & Business Intelligence

### Data Management & Governance

- Enterprise Integration
- Business Intelligence Strategy
- Big Data
- Data Management

### Enterprise Information Management

- Collaboration Platforms and Tools
- Enterprise Content Management (DAM)
- Enterprise Information Management



## Enterprise Architecture

### Strategy & Operating Model

- Architecture Domains
- Strategy & Operating Model
- IT Governance, Risk & Compliance
- IT Strategy

- Organizational Design
- Cloud Strategy

### Data & Business Intelligence

- BI Strategy
- Big Data
- Data Management
- Enterprise Integration

## Security

### Security Operations

- Data & Endpoint Security
- Identity & Access Management
- Risk Analysis, Incident Response & Threat Intelligence
- Security Processes & Operations

### Security Strategy & Governance

- Strategy & Governance
- Governance, Risk & Compliance
- Secure Cloud & Network Architecture
- Security Processes & Operations



## Project & Portfolio Management

### Project Management Office

- Portfolio Management
- Project Management
- Project Management Office

### Requirements & Analysis

- Requirements & Design
- Business Analysis

### Value & Performance

- Manage Business Relationships
- Performance Measurement



FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Tools and Templates

Save time creating critical IT documents and project deliverables with our massive, ready-to-deploy library of tools and templates.



## 150+ JOB DESCRIPTIONS

Detailed IT job description templates that will save time and effectively communicate the role.

- ▶ Application Development Manager
- ▶ IT Asset Manager
- ▶ Scrum Master
- ▶ Chief Data Officer
- ▶ Network Engineer

## 1,300+ TEMPLATES

Powerful tools and ready-made templates to identify issues and take action.

- ▶ SOP Template
- ▶ Strategic Plan Template
- ▶ IT Steering Committee Charter
- ▶ Data Center Relocation Project Charter
- ▶ Project Plan Template

## 100+ IT POLICIES

An extensive collection of IT policy templates to expedite authoring and ensure proper risk mitigation.

- ▶ Internet Acceptable Use Policy
- ▶ Patch Management Policy
- ▶ IT Triage and Support Policy
- ▶ Change Management Policy
- ▶ Email Acceptable Use Policy

FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Technology Selection and Implementation Research

25+ handbooks for navigating the most challenging technology evaluation and implementation projects.

Info-Tech helps you select the right technology solution by working with the individual vendors to gain an in-depth knowledge of their solution. Info-Tech firmly believes in providing unbiased research; therefore, all technology selection research is written from a staunch perspective of objectivity. Our members find our handbooks to be extremely helpful in making easy yet well-informed decisions.

## What's Included:

- 01 A matrix that enables clients to adjust vendor rankings based on the features and offerings that are most important to them.
- 02 An in-depth report that:
  - a. Explains how vendor rankings are broken down,
  - b. Reviews each vendor and solution considered in the handbook,
  - c. Provides insight and best practices related to that technology.
- 03 Best-practice guidance to help you plan the implementation and measure the effectiveness of the solution.



FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Software Reviews

We collect and analyze the most detailed reviews on enterprise software to give you an unprecedented view into products and vendors before you buy.

## How We Help

Learn from the collective knowledge of real IT professionals

- ▶ Know the products and features available
- ▶ Explore module and detailed feature level data
- ▶ Quickly understand the market

Evaluate market leaders through vendor rankings and awards

- ▶ Convince stakeholders with professional reports
- ▶ Avoid pitfalls with unfiltered data from real users
- ▶ Confidently select your software

Cut through misleading marketing materials

- ▶ Negotiate contracts based on data
- ▶ Know what to expect before you sign
- ▶ Effectively manage your IT vendor

**Verified reviews from real users. We checked.**

Data quality is paramount. That's why we bend over backwards to ensure that the data we are collecting is actually from experienced users, so you can trust it and make decisions with confidence.



FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Software Reviews Category Reports

Get assistance across the software selection process from solution strategy to vendor selection and contract support. The software experience is shaped by both the software and the relationship with the vendor. By comparing vendors across both, we provide a comprehensive understanding of the product and help identify vendors that can deliver.

## What's Inside?

- 01 **User Satisfaction Rankings** to compare software at a glance.
- 02 **Business Value Scores** to ensure you're getting your money's worth by comparing value delivered to cost.
- 03 **Vendor Capability Comparisons** across 11 dimensions.
- 04 **Individual Feature Evaluations** measured by comprehensive user satisfaction of the product across 11 features to give insight into the software and what it can do.
- 05 **Emotional Footprint Summary** that reveals the emotional sentiment held by end users based on their experience with the vendor.
- 06 **Proprietary Data Quadrant** that displays a comprehensive summary of the software landscape comparing product satisfaction and vendor experience.





FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Software Reviews Product Scorecards

A comprehensive report on a specific software product, aggregating feedback from real IT professionals and business leaders.

## What's Inside?

- 01** **Net Promoter Score** of the product that captures high level customer loyalty and satisfaction.
- 02** **Planned Renewal Rates** to see why clients left previous vendors and their average increase or decrease in satisfaction with that move.
- 03** **Feature and Vendor Capability Ratings** across 11 features and 11 capabilities respectively.
- 04** **Version and Module Satisfaction Levels** to provide you with detailed satisfaction ratings and adoption rates of modules and versions of the software.
- 05** **Comparisons Sliced by Organization Size, Usage, and Role** to ensure a right-sized solution for your use case.
- 06** **Individual Comments and Recommendations from Users** containing unedited data and real user quotes.





FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Contract Reviews

Optimize your software purchase. Whether you're purchasing or renewing, our analysts help you secure the right deal.

**Info-Tech has identified over \$100 million in savings through our contract review process.**

Send your purchase or renewal contracts (e.g. Microsoft, SAN storage, data center co-location) to our analysts so that we can review the contract, identify business risks, and provide insights.

Through a phone consultation, our analysts provide you with tailored insight into potential savings, compliance issues, appropriate feature options, and general best-practice tips for your contract negotiation process.

Unlike other vendors, Info-Tech does not take a percentage of any savings realized from this service or charge an additional fee for this valuable service.

After your call, we send a follow-up report to summarize the review and provide any additional advice we may have.

## Guidance

Licensing

Specs & Features

Terms of Service

Cost per Unit

Discount Levels

## How Info-Tech Helps

Determine the licensing approach in terms of number, type, and program to reduce costs and mitigate risks.

Review proposed hardware specs/COTS software capabilities to validate solution design meets needs without overbuilding.

Identify gaps and opportunities regarding proposed integrations, installation, service-plans/levels, customization details, and risks.

Specify item or unit-level cost negotiation opportunities.

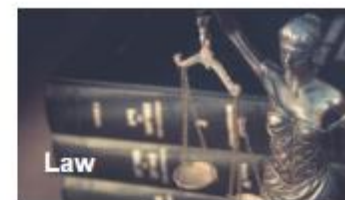
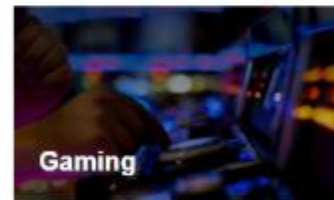
Highlight discount negotiation opportunities in terms of institutional, program, or channel discounts.



FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Industry Research Coverage

Industry-specific coverage across the 20 most common member verticals.



FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Industry-Specific Research

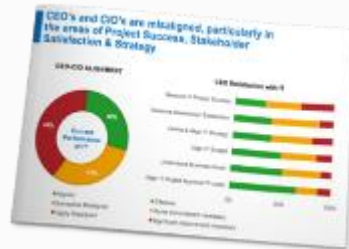
Deep vertical research so you can explore tailored insights into your industry, creating the most comprehensive membership experience Info-Tech has to offer.

## Benchmarking Reports

Industry-specific benchmarking reports built on years of in-depth industry data, collected using our innovative diagnostic programs.

We aggregate the data across hundreds of IT departments in your industry, to give you tailored vertical insights, all packaged in professional boardroom-ready reports.

- See where you stack up in your industry
- Follow current trends and build on best practices
- Make better decisions based on real data



## Reference Architectures

Reference architectures built on years of industry expertise, honed by analysts working with real IT professionals in your industry. Leverage industry best practices so you don't waste time and money reinventing the wheel.

- Speak the same language as partners to increase interoperability
- Facilitate benchmarking by leveraging best practices
- Ensure industry compliance and reduce risk



## Research Notes

Technology is moving at an ever-increasing speed. Our periodic industry research notes are here to keep you up to date on trends and timely topics in your industry. These short, digestible notes are perfect with your morning coffee, and will keep you on top of what matters most.

- Save more time with short notes that are easy to digest
- Stay in the loop with timely publications on current topics
- Get tailored research providing deep vertical knowledge



FASTER AND MORE EFFECTIVELY **COMPLETE YOUR TECHNOLOGY PROJECTS**

# Emerging Trends & Predictions

Weekly articles from world-renowned IT thought leaders to provide you with need-to-know information that will position you as a forward thinker among industry peers.



**Mark Anderson, Research Fellow**

Info-Tech's Predicting the Future reports are written by Mark Anderson, founder and CEO of Strategic News Service™, the world's most reliable source of advanced information at the intersection of technology and the economy. Trends & Predictions covers must-have information for strategy development and business technology planning from a global perspective.

Mark Anderson's predictive reports have an unmatched publicly graded prediction rate of over 94% and are actively followed by Bill Gates, Paul Jacobs, Michael Dell, and many other global industry leaders.

Trends & Predictions provides you with need-to-know information that will position you as a forward thinker among industry peers.

## **Topics Include:**

- ▶ Cyber Security
- ▶ Global Trends in Emerging Markets
- ▶ Special Reports on Amazon
- ▶ Internet of Things
- ▶ Science into Technology
- ▶ Technology & Genetics
- ▶ Healthcare Technology
- ▶ Big Data
- ▶ Sustainability & Energy



**TRAIN AND DEVELOP YOUR**

# **IT Leadership Team**

**Includes:**

- Talent and Leadership Research
- Info-Tech Academy
- Expert Assistance from Analyst Team
- Guided Implementations



# Train and Develop Your IT Leadership Team

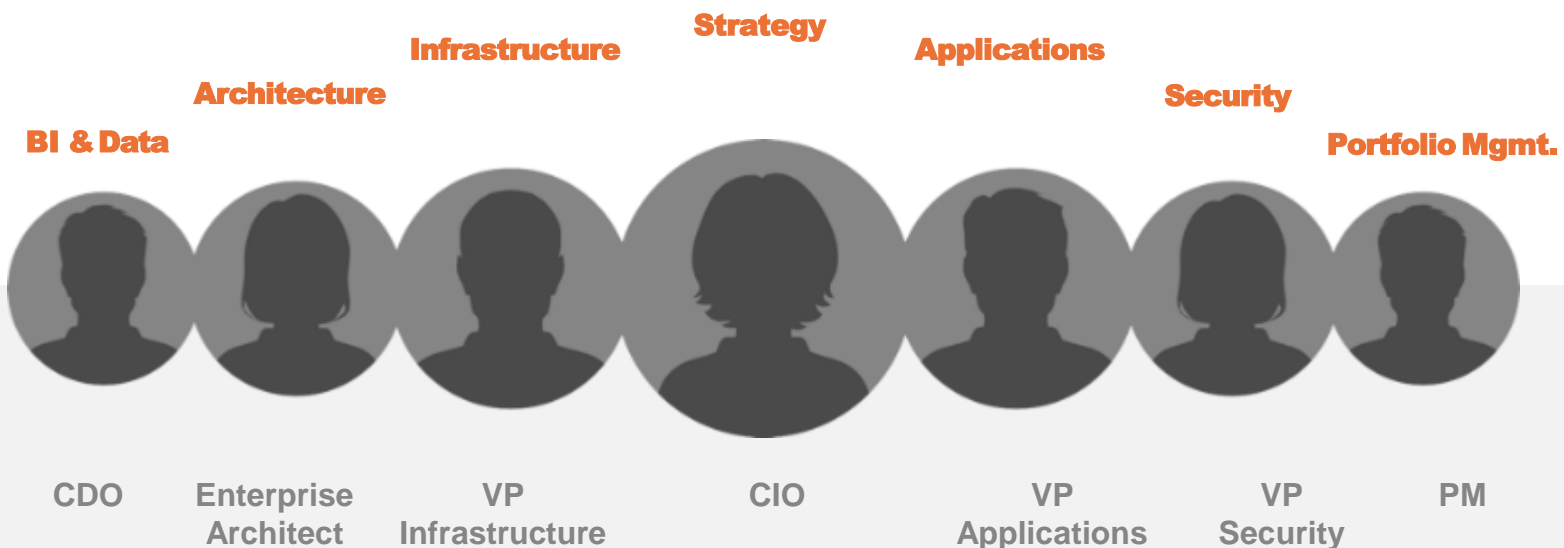
Have the right training in place for your IT executive team and help develop the next generation of IT managers.

## Establish Clear IT Process Owners

- ▶ Create accountability across your IT leadership team by establishing clear process owners for each of the 45 core IT processes.
- ▶ Ensure every process has an owner and that no single person is accountable for too much.
- ▶ Get key IT leaders to commit to a process improvement timeline and metrics and hold them accountable throughout the year.

## Leverage Info-Tech Training Resources

- ▶ Enroll team members in the Info-Tech Academy, an online learning management platform with 100+ hours of video content, 50+ quizzes and 9 certification programs.
- ▶ Utilize our role-specific research to drive process maturity & sustainable IT improvement.
- ▶ Each role contains a series of tools to help you assess strengths and weaknesses of your current state as well as help you envision your target.



TRAIN AND DEVELOP **YOUR IT LEADERSHIP TEAM**

# Talent and Leadership Research

30+ best-practice training materials to help IT leaders attract, hire, and develop talent, as well as lead and engage their teams.

Increase your IT team's engagement and productivity. Info-Tech's Team Leadership & Management Research Center provides the tools and advice you need to handle the unique challenges of managing people.

## Coverage Includes:

- ▶ Performance Management
- ▶ High Impact Leadership
- ▶ Succession Planning
- ▶ Engagement Strategies
- ▶ Management Skills
- ▶ Coaching
- ▶ Organizational Design
- ▶ Workforce Planning
- ▶ Sourcing & Screening
- ▶ Assessment & Selection
- ▶ Employee Development



TRAIN AND DEVELOP **YOUR IT LEADERSHIP TEAM**

# Info-Tech Academy

Our online learning management platform comes with 100+ hours of video content, 50+ quizzes, and 9 certification programs. Use the Info-Tech Academy to train your entire IT team and help them master their core IT processes.



Info~Tech Academy

A series of online courses designed to help your team master core IT processes.



Develop a world-class IT team with the Info-Tech Academy

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## Learn from Video, Audio & Written Content

Engaging video interviews and audio podcasts from our experts translate to higher completion rates and better retention of the concepts discussed.

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## Assign up to 45 Courses to Yourself & Your Team

Assign course content to yourself or your team at the click of a button, allowing for accountability and ownership over your learning journey.

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## Test IT Understanding & Track Progress

Multiple choice tests help users demonstrate content knowledge while you keep track of your team's progress and maintain oversight.

TRAIN AND DEVELOP **YOUR IT LEADERSHIP TEAM**

# Expert Assistance for Your Projects

For every project you start, we have an expert analyst waiting to help you execute best-practices and stay on schedule.

## CIO



## Infrastructure & Operations



## Security



## Applications



## Vendor Management



## Data & Business Intelligence



## Enterprise Architecture



## Project & Portfolio Management





## Guided Implementations

Unlimited phone access to our team of subject matter experts to guide you through your most challenging technology projects. An analyst from the team who wrote the research spends time with you over the phone, at key project milestones, to advise, coach, and offer insight. The service is available across our entire range of projects and core processes.

Each Guided Implementation conducted with our analysts saves our members an average of **\$22,517** and **14 days** of valuable IT resources.

### Expert Analyst Access

For every project you start, we have an expert analyst waiting to help you execute best practices and stay on schedule. It's on-demand project support when you need it the most.



**Randy Hearn**

Executive Advisor, Applications



**Sandi Conrad**

Senior Research Director, Infrastructure

### Standardize the Service Desk

#### Example Timeline

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#### PLAN

- 1 Conduct Current State Assessment
- 2 Review Service Desk Structure
- 3 Identify Metrics and Benchmarks

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#### DESIGN

- 1 Create Ticket Categorization, Prioritization, and Escalation Guidelines
- 2 Design Incident Management Workflow
- 3 Develop Request Fulfillment Process

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#### LAUNCH


- 1 Review ITSM Tool Requirements
- 2 Create an Implementation Roadmap



TRAIN AND DEVELOP **YOUR IT LEADERSHIP TEAM**

# Top Rated Guided Implementations

Unlimited phone access to our team of subject matter experts to guide you through your most challenging technology projects. An analyst from the team who wrote the research spends time with you over the phone, at key project milestones, to advise, coach, and offer insight. The service is available across our entire range of projects and core processes.

<p><b>Create a Right-Sized DR Plan</b></p> <p>Materials <b>9.4/10</b> Effectiveness <b>9.4/10</b> Ability to Act <b>9.4/10</b></p> <p><b>9.4/10</b></p> <p>Average Rating</p> 	<p><b>Define an IT Strategy and Roadmap</b></p> <p>Materials <b>8.6/10</b> Effectiveness <b>8.9/10</b> Ability to Act <b>7.9/10</b></p> <p><b>8.8/10</b></p> <p>Average Rating</p> 	<p><b>Standardize the Service Desk</b></p> <p>Materials <b>9.1/10</b> Effectiveness <b>9.1/10</b> Ability to Act <b>8.8/10</b></p> <p><b>9.3/10</b></p> <p>Average Rating</p> 	<p><b>Develop a PPM Strategy</b></p> <p>Materials <b>8.9/10</b> Effectiveness <b>8.8/10</b> Ability to Act <b>8.4/10</b></p> <p><b>8.8/10</b></p> <p>Average Rating</p> 	<p><b>Optimize Change Management</b></p> <p>Materials <b>9.5/10</b> Effectiveness <b>9.5/10</b> Ability to Act <b>9.0/10</b></p> <p><b>9.5/10</b></p> <p>Average Rating</p> 
<p><b>Build a User-Facing Service Catalog</b></p> <p>Materials <b>9.5/10</b> Effectiveness <b>10.0/10</b> Ability to Act <b>9.0/10</b></p> <p><b>9.5/10</b></p> <p>Average Rating</p> 	<p><b>Develop a Business Continuity Plan</b></p> <p>Materials <b>8.0/10</b> Effectiveness <b>9.0/10</b> Ability to Act <b>8.0/10</b></p> <p><b>9.0/10</b></p> <p>Average Rating</p> 	<p><b>Develop an EA Vision</b></p> <p>Materials <b>8.2/10</b> Effectiveness <b>7.3/10</b> Ability to Act <b>7.0/10</b></p> <p><b>8.0/10</b></p> <p>Average Rating</p> 	<p><b>Drive Value with an HRIS Strategy</b></p> <p>Materials <b>10.0/10</b> Effectiveness <b>10.0/10</b> Ability to Act <b>9.0/10</b></p> <p><b>10.0/10</b></p> <p>Average Rating</p> 	<p><b>Redesign Governance to Drive Results</b></p> <p>Materials <b>8.2/10</b> Effectiveness <b>8.7/10</b> Ability to Act <b>7.7/10</b></p> <p><b>9.2/10</b></p> <p>Average Rating</p> 
<p><b>Kick-Start IT-Led Business Innovation</b></p> <p>Materials <b>10.0/10</b> Effectiveness <b>9.0/10</b> Ability to Act <b>9.0/10</b></p> <p><b>9.5/10</b></p> <p>Average Rating</p> 	<p><b>Business Requirements Gathering</b></p> <p>Materials <b>8.0/10</b> Effectiveness <b>7.9/10</b> Ability to Act <b>9.2/10</b></p> <p><b>8.3/10</b></p> <p>Average Rating</p> 	<p><b>Tailor PM Processes to Fit Projects</b></p> <p>Materials <b>8.6/10</b> Effectiveness <b>8.9/10</b> Ability to Act <b>8.0/10</b></p> <p><b>8.9/10</b></p> <p>Average Rating</p> 	<p><b>Establish a Concrete ERP Foundation</b></p> <p>Materials <b>8.5/10</b> Effectiveness <b>9.5/10</b> Ability to Act <b>9.0/10</b></p> <p><b>9.0/10</b></p> <p>Average Rating</p> 	<p><b>Select and Implement a CRM Platform</b></p> <p>Materials <b>9.0/10</b> Effectiveness <b>9.2/10</b> Ability to Act <b>8.7/10</b></p> <p><b>9.1/10</b></p> <p>Average Rating</p> 

**BUILD A DATA-DRIVEN**

# **IT Strategy**

**Includes:**

- Stakeholder Feedback Tools
- IT Staff Feedback Tools
- Role-Based Assessments



# Build a Data-Driven IT Strategy

Articulating a clear IT strategy that aligns with business objectives is the most important activity an IT leader can do for the department and organization. Our data-driven programs ask business and IT stakeholders the right questions to ensure you have the inputs necessary to build an effective IT strategy.



**Infrastructure**



**Security**



**Applications**



**Project Management**

# Library of Diagnostic Tools

Info-Tech's diagnostic programs collect data from you and your stakeholders. Using our powerful analytic engines, Info-Tech builds reports that help your IT department make critical decisions.



## Ask the Right Questions

Use our low-effort surveys to get the data you need from stakeholders across the organization.

## Use Our Diagnostic Engine

Our diagnostic engine does all the heavy lifting and analysis, turning your data into usable information.

## Communicate & Take Action

Wow your executives with the incredible insights you've uncovered. Then, get to action: make IT better.

## Stakeholder Feedback Tools

Collect data from your stakeholders to build boardroom-ready reports that you can share with senior management and use to make strategic decisions.

- ▶ CEO-CIO Alignment
- ▶ CIO Business Vision
- ▶ End User Satisfaction

## IT Staff Feedback Tools

Collect data from your IT team to build powerful reports that help you make better management decisions.

- ▶ Management & Governance
- ▶ IT Staffing Assessment

## Role-Based Assessments

Use our automated tools to conduct assessments of your critical IT processes and turn them into actionable insights to communicate with stakeholders.

- ▶ Application Portfolio Assessment
- ▶ IT Security Diagnostic Program
- ▶ Project Portfolio Assessment

## BUILD A DATA-DRIVEN IT STRATEGY

# CIO Business Vision

An IT satisfaction survey program completed by all business leaders to provide you with a scorecard to better understand current performance and business needs.

Collect data from your stakeholders to build boardroom-ready reports that you can share with senior management and use to make strategic decisions.

Stakeholder management is a critical aspect of running a successful IT department. The CIO Business Vision program is a low-effort, high-impact program that will give you detailed report cards on the organization's satisfaction with IT's core services.

Use these insights to understand your key business stakeholders, find out what is important to them, and improve your interactions.

### We Help You:

- 01** Measure overall business stakeholder satisfaction.
- 02** Highlight the business impact of IT constraints.
- 03** Understand and manage individual stakeholders.
- 04** Collect feedback by department to clearly understand needs.





# CEO-CIO Alignment Program

An IT current state assessment completed by both the CEO and CIO to achieve alignment by understanding perspectives and priorities. Our questionnaire is only 20 questions and can be completed quickly by you and your CEO.

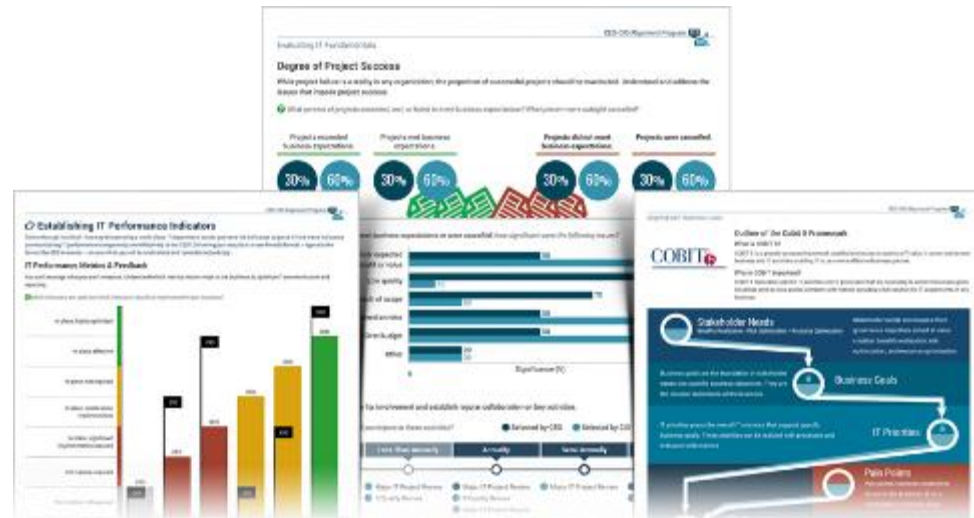
Alignment has been a buzzword for decades. Among CIOs, alignment is hyped as the apex of effective IT and written off as jargon. Yet without the proper tools, CIOs are left to play a guessing game of what deliverables the business demands.

Instead of producing an endless list to add to your backlog, the program brings clarity to what IT priorities need to be, how they are defined, and how their success is measured. It creates a tangible path to alignment and all of its associated benefits. Research reveals that companies with robust IT departments effectively aligned to business goals achieve higher growth compared to IT departments lacking alignment. For CIOs, effective alignment can be the tipping point in moving IT from supporting the business to enabling and transforming it.

## Achieve Alignment by Understanding Your CEO's Perspectives & Priorities

### We Help You:

- 01** Understand the CEO's perception of and vision for IT in your business.
- 02** Identify and build core IT processes that automate IT-business alignment.
- 03** Create a plan to address alignment gaps impeding business growth.
- 04** Deliver your plan to demonstrate IT value and progress.



# End User Satisfaction

An end-user satisfaction survey to gauge the sentiment and satisfaction with IT services, devices, and software.

Service optimization is nearly impossible to perform without an honest and thorough understanding of end-user sentiment toward IT services and software.

Develop data-driven insights to help you decide what IT services need to be addressed to meet the demands of the business.

## We Help You:

- 01** **Evaluate IT core service capabilities.** Evaluate importance of and satisfaction with core IT services, with drill-downs by seniority and department.
- 02** **Assess business enablement and IT communications.** Get end-user feedback on IT innovation & agility, and how technology enables users to do their jobs. Find opportunities to improve IT's reputation and assess IT's receptivity to feedback.
- 03** **Provide targeted department feedback.** Focus on the right end-user groups or lines of business to ramp up satisfaction and productivity.



# Management & Governance Diagnostic

An IT process effectiveness and importance assessment distributed to the entire IT department to build consensus and focus improvement efforts across 45 critical IT processes.



The difference between an IT department in firefighting mode and a business partner is strong core processes.

## We Help You:

- 01 Map your process landscape.** Determine which processes your team believes need more attention so you can effectively allocate resources.
- 02 Explore each process.** Dive deeper into process performance. Highlight contentious areas and understand how aligned your team is.
- 03 Build team alignment.** Use the results to facilitate an alignment exercise with the team. Build consensus by exploring opposing views.
- 04 Ensure ownership & accountability.** Assign process ownership and hold team members accountable for process improvement initiatives.

# IT Staffing Assessment

An IT staff and time allocation survey to visualize resource allocation across 20 IT functions and justify department headcount. Our comprehensive report shows you exactly where IT staff time is going and whether or not it's effectively driving results. Communicate how IT staff support the business and use included feedback from your staff to guide improvement exercises.

**Make IT a corporate powerhouse by improving your ability to grow, deploy, and manage your team.**

- 01** **Justify IT's headcount.** Demonstrate the correlation between staffing and business satisfaction, supported by industry peer benchmarks.
- 02** **Allocate staff more effectively.** Pinpoint misalignments between how FTEs are deployed and the priority of the service areas your teams work on.
- 03** **Get the most out of your teams.** Manage your team better by gathering feedback about how your staff want to be managed across 7 drivers of effective teams.





# Application Portfolio Assessment

An end-user software satisfaction survey to identify which applications need to be retired, upgraded, or better leveraged.

Application portfolio management is nearly impossible to perform without an honest and thorough understanding of end-user sentiment toward IT software.

Develop data-driven insights to help you decide which applications to retire, upgrade, retrain on, or maintain to meet the demands of the business.

## We Help You:

- 01 Take stock of your current application portfolio.
- 02 Assess the health of your portfolio by identifying which apps are not providing business value.
- 03 Identify cost saving opportunities by showing you which apps are not being used.
- 04 Manage end-user needs by department and seniority.





# IT Security Diagnostic Program

A security maturity assessment to evaluate and improve security governance, effectiveness, and business satisfaction.

Use our automated tools to conduct assessments of your critical IT processes – including applications, security, and project management – turn them into actionable insights to communicate with stakeholders. Thinking your organization is sufficiently protected against security threats isn't good enough. You need to know.

The IT Security Diagnostic Program is a low-effort, high-impact program designed to help IT security leaders assess and improve their security practices. Gather and report on IT security governance, business satisfaction, and effectiveness to understand where you stand and how you can improve.

## We Provide You With:

- 01 Governance & Management Scorecard.** Understand your current strengths and weaknesses, then follow Info-Tech's customized roadmap of practical and prioritized action items to improve and optimize your security governance and management.
- 02 IT Security Business Satisfaction & Alignment.** Measure business satisfaction in terms of security confidence and the amount of friction for business processes, and analyze gaps between IT and business perceptions.
- 03 Security Process & Technology Effectiveness.** Optimize IT security policies and processes, and drive improvement in technology usage and decisions.



# Project Portfolio Management Diagnostic Program

A project portfolio management maturity assessment to evaluate and improve the PPM practices.

The Project Portfolio Management Diagnostic Program is a low-effort, high-impact program designed to help project owners assess and improve their PPM practices. Gather and report on all aspects of your PPM environment in order to understand where you stand and how you can improve.

## We Help You:

- 01 Take stock of your current PPM practices and chart a strategy for success.
- 02 Get everyone on the same page by understanding the customer perspective.
- 03 Analyze your project portfolio management practices in-depth for thorough improvement and optimization.
- 04 Apply the in-depth approach to project management to achieve comprehensive success.

Project Intake

80%

Project Resourcing

Portfolio Reporting

54%  
OVERALL SCORE

BUILD A DATA-DRIVEN **IT STRATEGY**

# IT Scorecard

The IT Scorecard is a dynamic tool for managing and measuring your key IT metrics in one place.

## Manage & Measure Your Team's Results in One Place

- 01** **Build Your Custom Scorecard.** Start with 27 pre-populated best practice metrics, then customize them so that they fit your IT Organization.
- 02** **Involve Your Team.** Delegate metrics tracking accountability with team-level access.
- 03** **Integrate Assessment Data.** Include Info-Tech diagnostic data automatically to summarize your most critical satisfaction metrics.
- 04** **Inform the Business.** Download and share the Scorecard as a PDF with your extended team or business stakeholders.

## My Overall Scorecard Metrics

November 2017

⬇ Add New Period ⬆ Delete Period



Download as PDF

### CIO & Strategy

Business Stakeholder Satisfaction	DATA SOURCE CIO Business Vision ▾	72%
Capacity Satisfaction	CIO Business Vision ▾	57%
IT Cost, Benefit & Risk Transparency	Manual ▾	10%

### Enterprise Architecture

% Defects discovered in production	DATA SOURCE Manual ▾	66%
Satisfaction with Enterprise Architecture	Manual ▾	75%
% Core IT Processes with Accountability	Manual ▾	65%

### Apps

Application Satisfaction	DATA SOURCE CIO Business Vision ▾	65%
# Supported Applications	Manual ▾	50
Client Facing Apps Satisfaction	CIO Business Vision ▾	74%

**A STEP-BY-STEP PROGRAM TO**

# **Systematically Improve IT**

**Includes:**

- Dedicated Executive Advisor
- Key Initiative Plans
- Info-Tech Performance Difference

# Systematically Improve IT Performance

Follow our standardized path to drive IT maturity & effectiveness for your department. Each leader on your team will work with a dedicated Info-Tech Executive Advisor to create customized annual roadmaps to address their specific challenges and opportunities. Whether your IT department is an Unstable Operator, an Innovative Champion, or at any stage in between, Info-Tech has the proven knowledge & skills, and years of practical IT management & advisory experience to help stabilize and optimize your IT operations.

## Each Executive on Your Team Receives:

- ▶ A dedicated Executive Advisor to help diagnose and drive improvement within your organization.
- ▶ A customized Key Initiative Plan around your top priorities and a clear roadmap of how to improve their IT function.
- ▶ On-demand advisory support for all of your key projects.
- ▶ Complete online access to tools and best-practice resources.

## Info-Tech Research Group Maturity Model





SYSTEMATICALLY IMPROVE **IT PERFORMANCE**

## Dedicated Executive Advisor

Engage in recurring progress calls with your dedicated Account Manager and Executive Advisor to create real improvements over your membership.

**Talk to someone you know  
and who knows you well.**

### Your dedicated Executive Advisor will:

- ▶ Become intimately familiar with the details of your role and organization
- ▶ Expertly guide you through your biggest challenges and major projects
- ▶ Help you customize your annual Key Initiative Plan to maximize IT performance
- ▶ Direct you to the most relevant research resources and experiences
- ▶ Check in with you each quarter to discuss progress and next steps



**Andy Woyzbun**  
Executive Advisor

**Andy Woyzbun** is a Senior Executive Advisor with Info-Tech Research Group. Andy has over 45 years' experience in various technical, management, and executive IT roles, including over 10 years with Info-Tech. He has worked in a broad variety of industries, including computer services, government, consulting services, financial services, and telecommunications.

Andy has over 15 years of experience in executive roles. He gained deep experience in the business impact of technology during his tenure as executive in charge of lending services for Royal Trust, and as executive in charge of marketing, operations, and systems for North American Trust. Before joining Info-Tech Research Group, Andy was Chief Information Officer for two organizations providing telecommunications services, AT&T Canada and C1 Communications, and for ADP Canada, a leading payroll and human resources services provider.

Andy has an Engineering degree and an MBA from the University of Toronto and an MS in Computer Science from Stanford University.

# Your Key Initiative Plan

Use our role-specific roadmaps to drive process maturity and sustainable IT improvement.

## Roadmaps proven to deliver results

Key Initiative Plans are designed to help IT leaders focus on the most important & impactful initiatives to improve their function.

We provide you with tools and training to help you succeed at key projects that are proven to increase business satisfaction and enhance the capability of all key roles.

### Roles Include:

- ▶ CIO
- ▶ Infrastructure
- ▶ Applications
- ▶ Security
- ▶ Portfolio
- ▶ Enterprise Architecture
- ▶ Business Intelligence
- ▶ Vendor Management

## Example:

### Chief Information Officer Key Initiative Plan

#### Gain CEO-CIO Alignment

01

Over 67% of CIOs are misaligned with their CEOs as to the target role for IT. Find out why.

#### Define the CIO Business Vision

02

Only 28% of business leaders are supporters of IT. Find out what is important to the business.

#### Assess IT Management & Governance

03

IT leaders rate their core process effectiveness below 60%. Map your process landscape.

#### Develop an IT Strategy

04

Business stakeholders are 3.5 times more likely to be highly satisfied with IT if there is an effective IT strategy in place.

#### Build a New IT Organizational Structure

05

Strategic change means new processes and skills. Organizational design will ensure that you build the right team.

#### Build an IT Budget

06

43% of CIOs overestimate the size of their next budget. Make sure you're on the same page as your CFO.

#### Create a Service Management Roadmap

07

Avoid being one of the 66% who fail by trying to deliver valuable IT services without building a strong foundation of service management processes.

#### Optimize IT Governance

08

Governance is a key predictor of value generated by IT. Use our 5-step process to achieve effective governance.

#### Build an IT Risk Management Program

09

82% of organizations update their management strategy for enterprise risk at least once per year. So why doesn't IT?

# Infrastructure

## Key Initiative Plan

### Assess End-User Satisfaction

01

Use data-driven insights to thoroughly understand end-user sentiment toward IT services and software.

### Standardize the Service Desk

02

Increase end-user satisfaction by providing timely and effective responses to user requests and resolutions of all incidents.

### Exploit Disruptive Infrastructure Technology

03

New technology will disrupt IT infrastructure, putting your role and your company at risk. Develop a simple exploitation process that prepares for emerging technology before it's too late.

### Build an Infrastructure Roadmap

04

Keep agility and stability in focus while planning and communicating the future of your infrastructure practice.

### Craft a Cloud Strategy

05

Cloud computing is not going away, and is now a business reality with benefits for cost savings and IT/business transformation. Get ahead of the cloud or be left behind.

### Create a Right-Sized Disaster Recovery Plan

06

Stop just satisfying auditors, and start actually protecting the business.

### Develop an End-User Computing Strategy

07

Develop an end-user computing strategy and roadmap that fits all the pieces together, and then communicate the plan with a set of simple documents.

### Develop and Manage an Infrastructure & Operations Budget

08

Develop an accurate and business-centric I&O budget that builds trust and confidence with the business.

### Optimize Skills for Infrastructure & Operations

09

Finding the right staff with the right skills at the right time is critically important for any organization. It's doubly important and challenging in the changing world of IT infrastructure & operations.

# Applications

## Key Initiative Plan

### Assess Your Applications Portfolio

01

72% of organizations do not have a full understanding of their application portfolios.

### Build an Applications Roadmap

02

57% of organizations believe that modernizing their applications landscape is critical to achieving business objectives.

### Improve Your Requirements Gathering Process

03

70% of project failure is due to bad requirements. Don't be on the wrong end of this statistic.

### Govern & Manage an Enterprise Software Implementation

04

On average, 66% of large software projects are over budget, 33% are over time, and they deliver 17% less value than originally projected.

### Optimize Application Development

05

Only 14% of organizations identify their development throughput as highly effective.

### Enhance Your Software Quality Assurance Practice

06

Testing alone does not guarantee success. Quality needs to be embedded in every step of the PMLC.

### Develop an Annual Application Maintenance Program

07

50% of all maintenance is reactive. Establish a business-aligned plan for maintaining the most important applications in your environment.

### Establish an Applications Center of Excellence

08

53% of organizations receive less than half the benefits from their ERP implementations. Make sure you have a program to drive benefits realization post go-live.

### Adopt Business Process Improvement

09

Poor process equals poor business results. A good BPI initiative can result in a 50% reduction in labor costs.

# Security

## Key Initiative Plan

### Diagnose Security Issues

01

Despite all the security-related headlines in the news over the past few years, 94% of companies have experienced data breaches due to being stuck in reactive mode for operations.

### Build an Information Security Strategy

02

90% of companies are still in reactive mode when handling security issues. Elevate your security operations out of reactive “block and tackle” models and become a proactive juggernaut.

### Optimize Security Mitigation Effectiveness

03

The IT landscape evolves every 3 years, and security controls become obsolete over time. Being able to measure mitigation effectiveness leads to security excellence.

### Consolidate Security Risk Management Solutions

04

CISOs and CIOs must understand how to assess risk. It's easy to describe the value of risk management, but the question becomes how to manage the risk.

### Develop a Security Incident Management Program

05

Security incidents are inevitable, but how they're dealt with can make or break an organization. Poor incident response negatively impacts the business in multiple ways.

### Build a Security Awareness and Training Program

06

The #1 method of penetration by hackers is social engineering against humans. The best technology cannot prevent untrained humans from providing hackers with critical access information.

### Develop and Deploy Security Policies

07

Many companies still use regulatory governance as their policy control rather than using their business' DNA to create policy. Make policy work for you to enhance your company's security.

### Select and Implement a Governance, Risk, and Compliance Solution

08

Get the big picture of roles and responsibilities, operations and compliance obligations – and be able to manage them within one solution.

### Build a Risk-Based Security Budget

09

For years, security operations have been improperly seen as a cost center. Help your C-suite and board of directors see the value of security operations.



# Portfolio

## Key Initiative Plan

### Assess PPM Current State

01

Only 51% of project hours are spent productively. Find out how your organization compares and what actions to take next.

### Maintain an Organized Portfolio

02

47% of organizations have an unmanageable list of projects in their backlog. Start the year with a realistic, achievable plan.

### Develop a PPM Strategy

03

Only 43% of planned project work is being delivered each year. It's time to improve both planning and execution.

### Assess Your Project Management

04

On time. On budget. Within scope. High quality. Happy sponsors. Happy teams. Project management has a lot of moving parts you need to manage.

### Create Project Management Success

05

Organizations are only 58% satisfied with the quality of their project results. Establish a plan to improve.

### Drive Organizational Change from the PMO

06

Organizational change management ensures successful deployment and adoption, yet few organizations make someone accountable for OCM.

### Increase Benefits Realization

07

Make it easier to measure success from your projects.

### Develop Realistic Resource Management Practices

08

Two-thirds of IT project tasks could be better skills-matched.

### Build a Customer Satisfaction Report

09

Despite the movement toward Agile, customers still think of the three-constraints model of time, cost, and scope.

# Enterprise Architecture

## Key Initiative Plan

### Assess Enterprise Architecture Maturity

01

Understand the strengths and weaknesses of your EA practice to design your path forward.

### Design an Enterprise Architecture Strategy

02

Reduce the time to business value by creating an effective EA strategy.

### Define an Enterprise Architecture Operating Model

03

Realize the benefits of EA by balancing the need for controls with the desire for business engagement.

### Establish a Solid Business Architecture

04

Use business architecture to gain a clear understanding of your business strategy and better align IT with the business.

### Modernize Data Architecture

05

56% of financial firms put siloed, legacy data architecture as one of their largest data challenges. Step into the future while learning from the past with our approach to data architecture.

### Enhance Your Application Architecture

06

Organizations with an effective EA program have seen a 10% decrease in IT integration costs.

### Align Infrastructure Architecture to Business Value

07

A business-driven approach to infrastructure planning will help positively improve the business value of IT.

### Embed Security Architecture Into All Things IT

08

>93% of companies are still in reactive mode when handling security issues. An architecture-based approach will future-proof your organization.

### Select an Enterprise Architecture Tool

09

Not all EA tools are made the same. Ensure the tools you choose are better suited to your needs than what you currently have.

# Data & Business Intelligence

## Key Initiative Plan

### Create a Data Management Practice

01

Ideally, the right information should go to the right people, at the right time. However, 58% of organizations list “accessing relevant, timely, or reliable data” as their biggest obstacle.

### Improve Data Governance

02

92% of companies believe that data governance is worthy of ongoing investment. Get the right data to the right people at the right time with an enabling governance structure.

### Restore Trust in Your Data

03

United States Postal Service wasted \$1.5 billion on sending mail to the wrong addresses. Cutting corners on data quality has serious bottom-line implications.

### Modernize Data Architecture

04

56% of financial firms put siloed, legacy data architecture as one of their largest data challenges. Step into the future while learning from the past with our approach to data architecture.

### Optimize Data Integration Practices

05

34% of CFOs see data integration as an essential, but under-invested business operation.

### Develop a Master Data Management Strategy

06

Companies with a successful MDM strategy had customer retention rates of 91%, compared with 62% for those who didn't. Translate your master data into revenue with MDM.

### Build an Extensible Data Warehouse Foundation

07

66% of businesses reported a shortening of their “decision window” in 2014. Invest in a data repository that gets the right data to the right people at the right time.

### Build a Business Intelligence Strategy

08

95% of organizations report data and analytics keep them on par with or ahead of their local/global competitors. Create a comprehensive strategy that facilitates data-driven decision making.

### Leverage Big Data by Starting Small

09

Over 90% of the data that exists today has been created in the last two years alone. Big data is becoming simply data and is more approachable than ever; identify your differentiating use case today.

# Vendor

## Key Initiative Plan

### Review and Save on Your Top IT Contracts

01

Info-Tech has identified over \$50 million in savings through our contract review process.

### Establish a Vendor Management Office

02

An effective VMO can yield a 10X ROI on your staffing investments in this space.

### Manage Vendor Relationships

03

A focus on vendor relationships will yield a 4-5X greater economic benefit than extracting price concessions in isolation.

### Implement a Proactive Vendor Selection Process

04

Choose your partners carefully. One cross-industry study placed companies' average total spend per procurement employee at \$115 million.

### Master Contract Review for Software Agreements

05

IT leaders can save up to 5% of their IT budgets. Adopt our best practices to ensure you are not leaving money on the table.

### Proactively Identify and Mitigate Vendor Risk

06

On average, over 89 vendors are accessing a company's network every week (Bomgar).

### Prove the Value of Your Vendor Management Office

07

Vendor over-dependency and vendor-quality problems were cited as two of the top three major procurement risks by 77% of companies surveyed by MIT.

### Improve Contract Negotiations

08

IT leaders see operations budgets reducing by 2.5% this year. Adopt our best practices to ensure you are not leaving money on the table.

### Don't Allow Software Licensing to Derail Your M&A

09

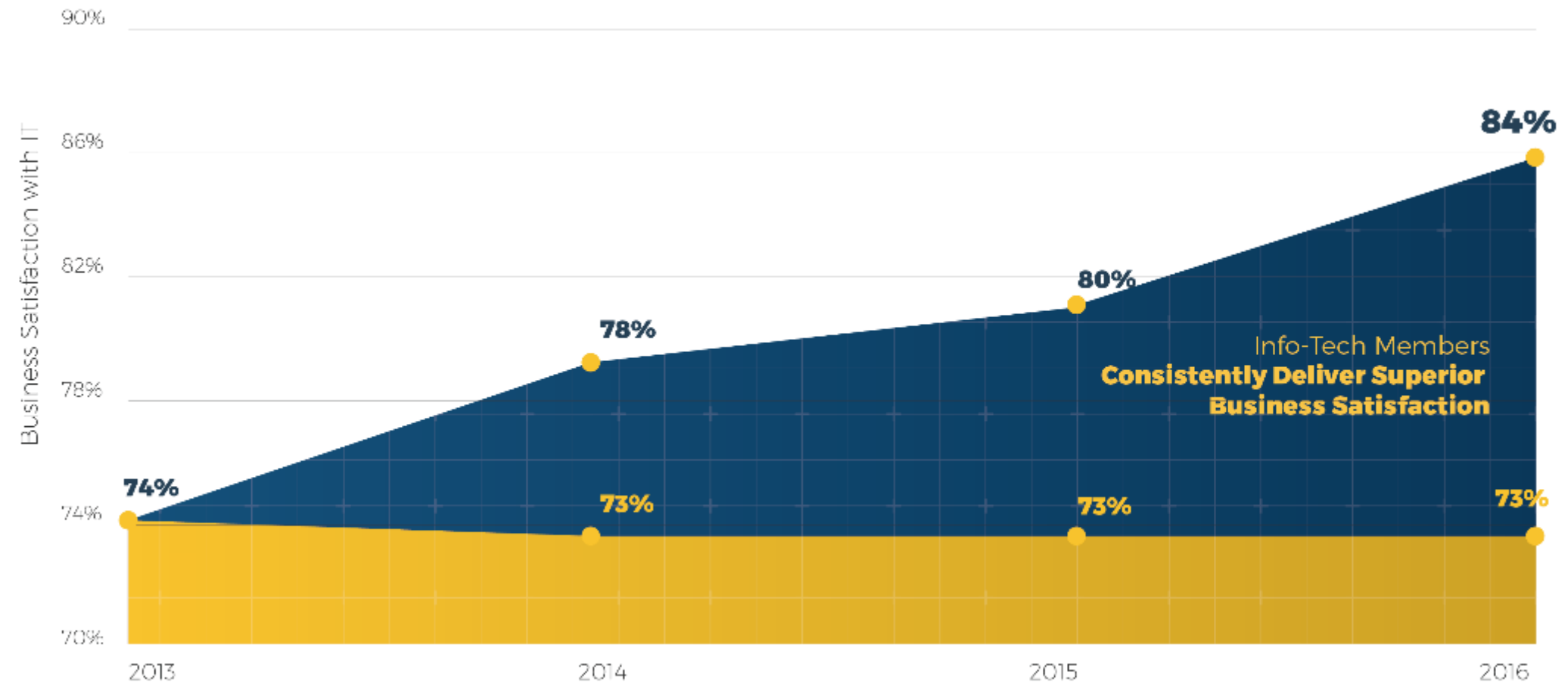
2015 saw \$4.7 trillion in M&A volume, which is 28% over 2014, with 87% of surveyed leaders projecting this activity level to sustain or exceed in 2016 (Deloitte).



Info-Tech Research Group

# Performance Difference

For over 20 years Info-Tech has provided IT teams with practical advice that helps make measurable improvement. Since launching our systematic program to improve IT performance in 2013, Info-Tech members have dramatically outperformed their peers by delivering superior levels of business satisfaction.



# Service Delivery & Member Access

## Includes:

- Service Delivery
- Reference Access
- Advisory Access
- Premium Advisory Access
- Counselor Service

# Research Methodology



Info-Tech's research is written based on observed best practices, key implementation steps, world-class research, and years of expertise, and it encompasses a broad range of technology topics that provide a base knowledge for all technology leaders.

Our research is designed to be action oriented and outcome driven (for example, build, optimize, and present a risk-based security budget).

All topics covered in our blueprints are organized into four research silos: Applications, Infrastructure, Management & Governance, and Talent & Leadership – and then are further categorized based on more specific areas of IT such as Information Management, Network & Communications, or Innovation.

All of our project blueprints, tools, templates, and other deliverables are easily found via the Info-Tech website.

Our research planning methodology incorporates new and emerging technologies while soliciting member feedback to ensure our research agenda covers the topics that matter most.

Some examples include cloud computing, cloud storage, the latest offerings from Microsoft, data management, mobile device management, IT governance, and project management.

At Info-Tech Research Group, our research agenda is driven by three factors:

- 01 PROJECTS OUR CLIENTS ARE WORKING ON
- 02 NEW TECHNOLOGIES OR PROCESSES THAT ARE BEING ADOPTED IN THE MARKET
- 03 INSIGHT AND PRODUCT KNOWLEDGE OF OUR ANALYSTS

# Research Process

The quality and credibility of the advice and recommendations contained in our best-practice research is of the utmost importance to Info-Tech. Each research project follows the same process to ensure that sound research and analysis practices have been applied.

## 01 Project Approval

Each best-practice project blueprint starts as a proposal for the research agenda. The project proposal outlines scope, client challenge, and client value. Each proposal is reviewed by a panel comprised of lead analysts, research management, and Info-Tech executives.

## 02 Scope Refinement

The project team – comprised of lead, senior, and junior analysts – contacts clients and noted experts in the field. Clients are interviewed to clarify specific challenges and identify expectations for how the research would be of greatest value. Experts, including consultants, practitioners, academics, and authors, are contacted to understand leading opinions and practices. Secondary research is conducted by the team to determine the current schools of thought about best practices. With this information, the project team develops a draft point of view and set of hypotheses around best practices and insights that will be further developed during the course of the project.

## 03 Analysis

Through additional analysis, hypotheses developed in Stage 2 are validated or refuted. The best-practice blueprint, including the supporting tools & templates and the workshop are developed. Research teams test conclusions, recommendations, and associated tools with clients and experts who have agreed to provide feedback on project results.

**Content Review:** Research results and documents are reviewed weekly by the research management team. The purpose of this review is to challenge and strengthen conclusions, explanations, and recommendations.

## 04 Road Testing

During project development, we test our research by engaging clients in onsite workshops. The feedback gathered in this workshop is incorporated into the final product.

## 05 Executive Review

Once the best-practice blueprint is complete, it is submitted for executive review. A panel of lead analysts, research management, and Info-Tech executives score the blueprint to ensure the following:

- ▶ The recommended project steps are adequately supported by primary and secondary research
- ▶ The research insight is applicable to the target client group
- ▶ The recommendations are actionable and will yield measurable results
- ▶ The best-practice blueprint offers tangible value for clients

# Service Delivery

Every organization is unique. That's why Info-Tech provides a variety of high-impact, low-effort ways to consume our research. From Do-It-Yourself project guides to fully customized consulting engagements, we are committed to delivering high-value experiences that best meet your organization's needs.

OUR SERVICE OFFERINGS	DEFINITION	USE CASE
01 <b>Step-by-Step Blueprints</b>	Do-it-yourself tools, best-practice methodologies, and final deliverables.	"Our team has the capability to run this project but some <b>tools &amp; resources</b> would save us time and effort."
02 <b>Guided Implementations</b>	Support your key projects with over-the-phone advisory services.	"Our team is managing the project but could use some <b>check-ins</b> to help keep us on track."
03 <b>Onsite Workshops</b>	Accelerate IT projects, develop an IT strategy, or improve core processes with innovative workshops.	"We need to <b>kickstart this project</b> and <b>make immediate progress.</b> "
04 <b>Consulting</b>	Fully customized advisory services based on your unique needs.	"Our team does not have the time or the knowledge to take this project on. We <b>need assistance through the entirety of this project.</b> "



# Website Access

Each named user will receive unlimited access to our website where they can browse through our extensive catalog of IT research, download our ready-to-use tools and templates, book experiences, and save their favorite content to their research library.

## Online Features

- ▶ Unique User Login Credentials
- ▶ Advanced Keyword Search
- ▶ Filter Content by Area and Type
- ▶ Content Preview
- ▶ Video Content Player
- ▶ Content Downloading
- ▶ Personal Library for Saved Research
- ▶ Training Course Enrollment
- ▶ Book Experiences
- ▶ Share Content with Peers
- ▶ Share Content on Social Media
- ▶ Customizable Account Settings



# Unlimited Expert Phone Consultation

Unlimited phone access to our team of subject matter experts to guide you through your most challenging technology projects. An analyst from the team who wrote the research spends time with you over the phone, at key project milestones, to advise, coach, and offer insight. The service is available across our entire range of projects and core processes.

Each Guided Implementation conducted with our analysts saves our members an average of **\$22,517** and **14 days** of valuable IT resources.

## Expert Analyst Access

For every project you start, we have an expert analyst waiting to help you execute best practices and stay on schedule. It's on-demand project support when you need it the most.



**Randy Hearn**

Executive Advisor, Applications



**Sandi Conrad**

Senior Research Director, Infrastructure

## Standardize the Service Desk

Example Timeline

### PLAN

- 1 Conduct Current State Assessment
- 2 Review Service Desk Structure
- 3 Identify Metrics and Benchmarks

### DESIGN

- 1 Create Ticket Categorization, Prioritization, and Escalation Guidelines
- 2 Design Incident Management Workflow
- 3 Develop Request Fulfillment Process

### LAUNCH

- 1 Review ITSM Tool Requirements
- 2 Create an Implementation Roadmap

# Dedicated Executive Advisor

Engage in recurring progress calls with your dedicated Account Manager and Executive Advisor to create real improvements over your membership.

**Talk to someone you know  
and who knows you well.**

## Your dedicated Executive Advisor will:

- ▶ Become intimately familiar with the details of your role and organization
- ▶ Expertly guide you through your biggest challenges and major projects
- ▶ Help you customize your annual Key Initiative Plan to maximize IT performance
- ▶ Direct you to the most relevant research resources and experiences
- ▶ Check in with you each quarter to discuss progress and next steps



**Andy Woyzbun**  
Executive Advisor

**Andy Woyzbun** is a Senior Executive Advisor with Info-Tech Research Group. Andy has over 45 years' experience in various technical, management, and executive IT roles, including over 10 years with Info-Tech. He has worked in a broad variety of industries, including computer services, government, consulting services, financial services, and telecommunications.

Andy has over 15 years of experience in executive roles. He gained deep experience in the business impact of technology during his tenure as executive in charge of lending services for Royal Trust, and as executive in charge of marketing, operations, and systems for North American Trust. Before joining Info-Tech Research Group, Andy was Chief Information Officer for two organizations providing telecommunications services, AT&T Canada and C1 Communications, and for ADP Canada, a leading payroll and human resources services provider.

Andy has an Engineering degree and an MBA from the University of Toronto and an MS in Computer Science from Stanford University.

# Exclusive access to an Executive Counselor

Your executive counselor will leverage decades of personal experiences and Info-Tech's resources to deliver customized thought leadership and results-driven value to assist you in your delivery of outstanding business results.

**Leverage the unique insights from someone who's walked in your shoes.**

## Your dedicated Executive Counselor can:

- ▶ Develop a personalized annual agenda based on your unique needs and goals.
- ▶ Support you through your biggest challenges and professional aspirations.
- ▶ Help you develop and work through a professional development plan.
- ▶ Tailor relevant research resources and experiences to suit your context.
- ▶ Check in with you monthly to discuss your progression and burning issues.



**Terry Moore**

VP, Executive Services  
Executive Counselor

**Terry Moore** is an Executive Counselor with Info-Tech Research Group and is responsible for our Counselor services, globally. Terry has over 30 years experience in various technical, management, and executive IT roles, including over 10 years as an Executive Partner for hundreds of CIOs. He has worked and consulted in a variety of industries including technology, government, consulting services, utilities, retail, distribution, petroleum, healthcare, finance, manufacturing, and education.

Terry has over 20 years of experience in executive roles. He gained extensive experience in the business impact of technology, human capital management, shared services, marketing, communications and leadership during his professional career. Terry has experience in working in many different cultures including private, public, and partnership governance structures. His professional experiences include KPMG Consulting Partner, IBM Director of Professional Services, Gartner Vice President and Pilot Corporations, CIO.

Terry has an MBA from the University of Tennessee in Management and Marketing and a Bachelor of Engineering from Vanderbilt University in Bio-Medical & Electrical Engineering.

# Your Onsite Workshop

Included in an onsite membership is a five-day engagement where our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team. We use a learning-based approach to implement Info-Tech methodologies tailored to your unique situation.

## Why Workshops?

### 01 | Get 90% of Any Project Done in 5 Days

**Spend 5 intense and focused days** to collapse project timelines and make major project decisions.

**Utilize our proven and road-tested methodologies** to get your project done quickly and effectively.

**Hundreds of project and process workshops** available to help with any topic that is important to you.

### 02 | High Value, Standard Pricing, No-Hassle Negotiating

**No-hassle negotiating and scoping**, always a flat rate across all projects.

**Gain and share expertise** over a variety of short, focused engagements, instead of one, longer term consulting project.

**High-value engagements**, not long run-away consulting projects that never end.

### 03 | An Intense, Collaborative Learning Experience

Workshop materials have been rigorously road-tested and **built on industry best practices**.

**Develop and train your team** through collaboration with our expert facilitators.

**Extend your team** by drawing on our analysts across a wide range of specialties.

### 04 | Proven Results

Since launching the product, Info-Tech has delivered **over 600 onsite workshops** with an overall satisfaction rating of **9.8/10**.

**96%** of workshop participants rate the effectiveness of the expert facilitators at an **8 out of 10 or higher**.

On average, workshops save our members **\$56,411 per engagement**.



# Info-Tech's <https://www.infotech.com>

## Membership Engagement

### CIO Counselor

- ✓ Exclusive access to an executive counselor for monthly connections and quarterly in-person meetings
- ✓ *Input into research agenda*
- ✓ Premium membership upgrade (Software / Industry)
- ✓ *Executive exchange*
- ✓ Leadership development for team
- ✓ *Reference access for your personal assistant*
- ✓ Follow-Me service for career transitions
- ✓ *McLean 360 evaluation*
- ✓ Plus all features & benefits included in Executive, Advisory & Reference memberships

### Executive Counselor

- ✓ Exclusive access to an executive counselor for quarterly connections and biannual in-person meetings
- ✓ *Front of the line advisory level access to analysts*
- ✓ Research agenda inputs
- ✓ *Info-Tech Event Platinum ticket*
- ✓ *"Social Contract" Value tracker*
- ✓ Plus all features & benefits included in Advisory & Reference memberships

### Advisory

- ✓ Unlimited access to diagnostic programs
- ✓ Unlimited phone access to analyst team
- ✓ Unlimited purchase optimization and contract review
- ✓ Access to a dedicated executive advisor
- ✓ Plus all features & benefits included in Reference memberships

### Reference

- ✓ Access to ALL ITRG Research
- ✓ Unlimited access to best-practice methodologies
- ✓ Unlimited access to tools and templates
- ✓ Unlimited access to Info-Tech Academy – an online learning platform

### Additional Services

- ✓ Onsite Upgrade
- ✓ Premium Upgrade
- ✓ Training Events

**For Leaders**

**For Managers**

**For Staff**

# Reference Seat Access

## Technology Projects

Role-Based Research	300+ instructional blueprints for effectively executing IT projects for the 8 main roles in IT: <ul style="list-style-type: none"><li>▪ CIO</li><li>▪ Applications</li><li>▪ Infrastructure</li><li>▪ Security</li><li>▪ Project &amp; PPM</li><li>▪ Data &amp; BI</li><li>▪ Enterprise Architecture</li><li>▪ Vendor Management</li></ul>
Technology Selection & Implementation Research	25+ handbooks for navigating the most challenging technology evaluation and implementation projects.
Tools & Templates	Over 1,000 powerful tools and ready-made templates to identify issues and take action.
On-Demand Webinars	150+ recordings of Info-Tech Analysts sharing their latest findings and presenting their recent publications.
Infographics	More than 100 highly visual summaries of our research meant for easy consumption and quick sharing with peers.
Trends & Predictions	Weekly articles from world-renowned IT thought leaders to provide you with need-to-know information that will position you as a forward thinker among industry peers.

## Core IT Processes

IT Management & Governance Framework	45 comprehensive, connected methodologies for improving and optimizing core IT processes.
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## IT Leadership Team

Info-Tech Academy	Access to our online learning management platform with 100+ hours of video content, 50+ quizzes, and 9 certification programs.
Talent & Leadership Research	30+ best practice training materials to help IT leaders attract, hire, and develop talent, as well as lead and engage their teams.
Job Description Bank	150+ detailed IT job description templates that will save time and effectively communicate the role.
IT Policy Library	An extensive collection of 100+ IT policy templates to expedite authoring and ensure proper risk mitigation.

# Advisory Seat Access

In addition to the access provided to Reference Seat holders, Advisory Seat holders have access to the following products:

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## Systematically Improve IT

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### Dedicated Account Manager & Executive Advisor

Engage in recurring progress calls with your dedicated Account Manager and Executive Advisor to create real improvements over your membership.

### Key Initiative Plans

This role-based membership program has been specifically designed with key initiatives that our members have found to make the most significant impact for individuals in this role.

- CIO
- Applications
- Infrastructure
- Security
- Projects & PPM
- Data & BI
- Enterprise Architecture
- Vendor Management

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## Core IT Processes

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### Diagnostics Programs

Info-Tech diagnostics are an automated way to collect crucial data, turn it into actionable insights, and communicate with stakeholders.

1. End User Satisfaction
2. IT Security Program
3. Application Portfolio Assessment
4. Project Portfolio Assessment

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## IT Strategy

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### Data-Driven IT Strategy

These data-driven programs collect data from you and your stakeholders to build powerful reports that help your IT department make strategic decisions.

1. CEO-CIO Alignment
2. CIO Business Vision
3. Management & Governance
4. IT Staffing Assessment

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## Technology Projects

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### Guided Implementations

Unlimited phone access to our subject matter experts to guide you through your most challenging technology projects.

### Contract Review

Our analyst team reviews your most important technology contracts to identify ways to save you money and correct vendor-slanted terms and conditions.

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## IT Leadership Team

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### IT Engagement Survey

A high-frequency, low-effort, one-question IT employee engagement survey to measure and improve staff engagement levels.

# Premium Advisory Seat Access

In addition to the access provided to Advisory Seat holders, Premium Advisory Seat holders have access to the following products:

## Software Reviews

We collect and analyze the most detailed reviews on enterprise software to give you an unprecedented view into products and vendors before you buy.

### Category Reports

Thorough 30-page evaluations and rankings of all software in an individual category to compare products across every dimension.

Example software categories include:

- Business Intelligence
- IT Asset Management
- Endpoint Protection
- Application Development Tools
- CRM
- ERP
- HR Systems
- Data Integration

### Product Scorecards

Comprehensive 35-page reports on a specific software product, aggregating feedback from real IT professionals and business leaders.

Example software vendors include:

- Microsoft
- SAP
- Salesforce
- Kronos
- Oracle
- IBM
- ADP
- Epicor

## Industry-Specific Research

### Industry Reference Architectures

Industry specific diagrams outlining all business functions potentially affected by IT.

### Business Alignment Reports

Make informed strategic decisions based on aggregated business satisfaction and prioritization data from your industry peers.

### Budget & Costing Reports

Incorporate cost benchmarking data from your industry peers into your IT budgeting process to determine and justify spending.

### Roundtable Events

Quarterly sessions with a community of key industry members to discuss common challenges, trends, and best practices.

### Industry Research Notes

Short, tailored research notes aimed at providing you with timely insights, relevant to your industry.

Industries covered include:

- Government
- Manufacturing
- Insurance
- Utilities
- Consulting
- Construction
- Energy
- Gaming
- Law
- Not for Profit
- Healthcare
- Education
- Banking
- Technology
- Retail
- Chemicals
- Hospitality
- Pharma and Bio-Tech
- Transportation
- Sports and Entertainment

# Executive Counselor Service

In addition to the access provided to Advisory Seat holders, Executive Counselor members have exclusive access to the following services:

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## Dedicated Executive Counselor

An Executive Counselor membership provides unparalleled personal support to senior IT executives. Designed for the unique challenges of IT leadership, this membership partners current IT executives with a seasoned IT executive who has firsthand diverse IT and leadership experiences.

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### Trusted Confidant

Your executive counselor will schedule monthly consultative sessions, be available for ad hoc advice, and come onsite up to four (4) times annually to focus on your agreed-to agenda.

Discussion points include:

- Professional development & career advice
- Facilitated research briefings
- Individual executive and IT brand management

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## Research and Analysts

- “Front of the line” analyst access
- Info-Tech research agenda participation

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## Events

- VIP / Event LIVE Platinum individual access

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## Personalized Service

The highly personalized Counselor membership services are based on your unique needs. From your confidential discussions, you and your counselor will build a program to elevate your career and enhance your IT department. This can include:

- Professional development and peer-to-peer networking
- Decision support and review
- Facilitated research discussions customized to your environment
- Personalized value plan

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## Leadership Development

- McLean 360-Degree Feedback



# CIO Counselor Service

In addition to the access provided to Premium Advisory Seat holders, CIO Counselor members have exclusive access to the following services:

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## Dedicated Executive Counselor

A CIO Counselor membership provides unparalleled personal support to C-Level Executives. Designed for the unique challenges of IT leadership, this membership partners current IT executives with a seasoned IT executive who has firsthand diverse IT and leadership experiences.

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### Trusted Confidant

Your executive counselor will schedule monthly consultative sessions, be available for ad hoc advice, and come onsite up to four (4) times annually to focus on your agreed-to agenda.

Discussion points include:

- Professional development & career advice
- Facilitated research briefings
- Individual executive and IT brand management

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## Research and Analysts

- “Front of the line” analyst access
- Info-Tech research agenda participation
- Personal assistant access to research for you

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## Events

- VIP / Event LIVE Platinum individual access

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## Industry Insights

- Includes access to all Premium Advisory content

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## Personalized Service

The highly personalized Counselor membership services are based on your unique needs. From your confidential discussions, you and your counselor will build a program to elevate your career and enhance your IT department. This can include:

- Professional development and peer-to-peer networking
- Decision support and review
- Facilitated research discussions customized to your environment
- Personalized value plan

---

## “Follow Me” Service

### Transition Roles

Roles, jobs, and responsibilities will change over the course of a career. Transition periods may be the most important time to have access to research, advisory, and counseling services. We will be there to provide support as you advance in your career.

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## Leadership Development

- McLean 360-Degree Feedback
- Executive exchanges
- Leadership team development

# Additional Info-Tech Services

## **Includes:**

- Workshops & Consulting
- Leadership Training and Events
- CIO Counselor Seat
- MyPolicies

# Onsite Workshops

Over the course of five days, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team. We use a learning-based approach to implement Info-Tech methodologies tailored to your unique situation.

**An innovative approach to consulting.  
Your most pressing IT problems solved in one week.**

## Project Workshops

A valuable way to plan your IT project implementations. Let our experienced facilitators guide you through an innovative workshop held onsite at your location.

## Process Workshops

A dynamic way to enhance your core IT processes and build a world-class operation. Engage your IT team onsite at your location in an innovative workshop.

### Example: Business Intelligence Vendor Selection

5-Day Workshops	Day 1	Day 2	Day 3	Day 4	Day 5
	Workshop Preparation (Offsite)	Business Case & Enterprise Requirements	Define Business Area Requirements	Formulate Vendor Selection Criteria	Define Selection Tactics and Implementation
	Workshop objectives and scope planning	The case for BI/analytics	Discuss business BI/analytics challenges and opportunities	Solution architecture	Develop vendor selection tactics and approach
	Confirm workshop objectives and scope	Industry outlook for BI/analytics	Identify business needs	Consolidate workshop's outcome & rationalize requirements	Define the select and implement project
	Identify up to three areas that will contribute in the workshop	Enterprise level - business requirements	Map business needs to key features of BI/analytics tools	Develop high-level solution architecture	Create use-case scenarios for vendor demos
	Set workshop agenda and secure participants' commitment	Identify business goals, objectives, and stakeholders	Discuss authoritative data environment	Discuss requirements in the context of vendors' offerings	Develop vendor demo script
	Information gathering	Identify high-level data/analytics requirements	Identify challenges, opportunities & environmental constraints	Refine requirements	Define high-level implementation strategy
		Map business needs to key features of BI/analytics tools		Shortlist vendors	Define high-level implementation roadmap

# Consulting Services

Our Consulting Services provide you with expert practitioners and advisors throughout the duration of your engagement, enabling you to effectively outsource your IT initiative or project to those with the knowledge, skills, and tools to deliver quality-driven value. Info-Tech Consulting Services blends the insights of our more than 30,000 members with the market-approved talents and methodologies of our consulting staff to bring your organization a unique, powerful, and holistic professional services offering.



## Info-Tech Focus Areas

### CIO Consulting

(Strategy, Services & Governance)

### Applications Consulting

(Selection, Development & Management)

### Infrastructure Consulting

(Planning, Optimization & Outsourcing)

### Security Consulting

(Security, Risk & Compliance)

### Vendor Consulting

(Vendor Intelligence & Custom Studies)

# Leadership Training

Info-Tech's Leadership Training addresses the widening gap between the growing demands on future IT leaders and development programs that historically excelled more in technical mastery than capabilities like leadership, talent development, innovation, client engagement, and executive engagement.

The program unfolds over a single 5-day session held at our office, the historic Masonic Temple in Toronto, Ontario.

Info-Tech's faculty designed this program to cost-effectively develop your future leaders functionally through experiential activities, peer-to-peer learning, and reinforcement of lessons learned in their actual work.



## Leadership Training

Targeted at up-and-coming high potentials in IT that are being groomed for bigger leadership positions.

Program designed to:

- Develop and Deploy Critical Skills for the IT Function
- Maximize the Retention and Productivity of High Potential Staff
- Improve Leadership Decision Making and Performance
- Create a Strong Network of High Potentials in IT

## Leadership Training – Women in IT

This session is specifically targeted to high-potential women in all positions within the IT department, including the CIO role. It focuses on several challenges specific to the unique experiences of women, including network activation and negotiation.

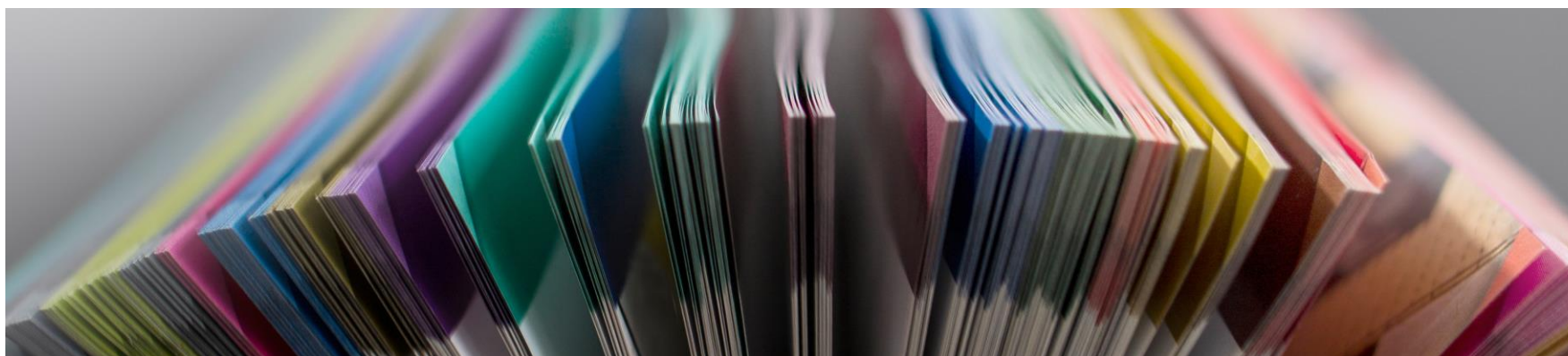
Program highlights:

- Foster a Cross-Company Network of Emerging Female Leaders
- Develop High-Level Strategy for Building a More Inclusive Culture
- Identify and Discuss the Unique Issues Women in Their Organization Face



# Management Playbooks

Management Playbooks are immersive, 5-day, role-specific training programs focused on developing management practices. The program is designed to help you run a top-notch department. The key takeaway is a Playbook you can use to execute everything you've learned in the week.



**Each Management Playbook follows the same structure, but is customized to your specific role in IT.**

## Roles Include:

- ▶ CIO
- ▶ Applications
- ▶ Infrastructure (Coming Soon!)
- ▶ Security (Coming Soon!)

Day 1	Day 2	Day 3	Day 4	Day 5
<p>Your First 100 Days</p> <p>Introduction to the Playbook, your 100 day guide to executing on your departmental objectives after the program.</p>	<p>How to Spend your Time</p> <p>Explore how top managers spend and structure their time. What meetings do they book? How do they get everything done?</p>	<p>Top 10 Projects &amp; Processes</p> <p>Identify the top 10 project, processes, and reports you need to manage and how to optimize their performance.</p>	<p>Top 10 Metrics</p> <p>Pinpoint the vital metrics that have the greatest business impact and paint the clearest picture of your department's performance.</p>	<p>Building an Action Plan</p> <p>Create an action plan for your top departmental projects and goals for improvement. Focus on where you are needed most.</p>

# LIVE

**The Masonic Temple, Toronto**  
**May 8-10<sup>th</sup>, 2018**



LIVE is the must-attend event for any IT executive serious about improving business and IT alignment throughout their organization.

The event's tactical agenda is designed by practitioners, focusing on real, everyday challenges and will ensure that all attendees are engaged, productive, and challenged throughout the program.



## Why Attend Info-Tech LIVE?

- 01** Attend role-specific workshops designed to help you drive value rapidly..
- 02** Benchmark your current strategies and initiatives with other leading companies.
- 03** Unsurpassed formal and informal networking opportunities to share, collaborate, exchange ideas and concepts.
- 04** Digest Info-Tech's industry leading research concerning the latest trends affecting your organization.



**Guest Speaker Keynote**  
**Pattern Discovery: Digital Transformation's Missing Ingredient**  
**Mark Andersen**

Anderson is the founder and CEO of Strategic News Service, the world's most reliable predictive reports covering the computing and communication industries. His weekly Trends and Predictions provide must-have information for strategy development and business technology planning, and are followed by technology executives and investors worldwide.

ADDITIONAL INFO-TECH SERVICES

LIVE

Ticket Details

What's included	Regular \$1,900 USD/Ticket	Platinum \$2,100 USD/Ticket
Pre-Event Dinner with Mark Anderson and former MLSE CEO, Richard Peddie		•
Preferred Seating for Keynotes		•
Copy of books written by our special guests		•
Industry Roundtable	•	•
EA Meet-Ups	•	•
Playbook Workshop	•	•
Daily Catering	•	•
Blue Jays Game	•	•



For further details on group prices please contact us at 1-800-670-8889

## myPolicies

myPolicies is a web-based solution that streamlines the creation, approval, distribution, and monitoring of corporate policies, procedures, and forms. Our solution provides policy managers with the tools they need to mitigate the risk of sanctions and reduce the administrative burden of policy management. It also enables employees to find the policies, procedures, and forms relevant to them and build a culture of compliance.



### **Restore Order to your Policies**

Store all of your most up-to-date policies in an easy-to-navigate central repository.

### **Automate Policy Management**

Collecting signatures has never been easier with myPolicies' effortless document distribution and tracking.

### **Stop Writing Policies**

Never write another policy from scratch with over 150 best-practice policy templates.

### **One-Click Reporting**

Quickly and confidently report on policy activity that matters to you, your stakeholders, and your auditors.



# INFO~TECH

R E S E A R C H   G R O U P