

# ISM645 Information Technology Strategic Plan Template

V1.8

## Introduction: How to Use This Tool

This template is developed for small and mid-sized enterprises (SMEs) that do not have the resources to perform full IT governance to develop a complex IT strategy. This tool provides an outline that allows CIOs to develop a simple, yet effective IT strategic plan.

Complete all the sections, using the instructions provided. Each section contains an example that can be removed once the document is complete.

## [Insert Company Name] IT Strategic Plan

Author: [Insert Name]  
Created on: [Insert Date]  
Last Modified on: [Insert Date]

## Executive Introduction (Summary) & Thesis Statement

Introduce the IT Strategic Plan. Give a summary of what is in the document. The Executive Summary should be a 30 second read and give a clear understanding of what is in the document. In the last paragraph, include a thesis statement.

Example: This IT Strategic Plan lays out the one, two, and three year plans for MarkO Ltd, with regards to IT Areas of Applications Development, Networking, Operating Systems, Databases, Organization, and Hardware; and the ability for this plan to support the business initiatives of the company.

## Strategic IT Mission, IT Vision, and Horizon Statements

Include the IT Mission and IT Vision Statement here. Also, specify the time periods to which this plan pertains.

Example:

"The mission of this company is to ...."

"This Company will be the ...."

"This plan is expected to cover the period from 01/Sept/2013 to 31/Aug/2015, with strategic plans for each year noted."

## Purpose of Plan

Indicate the reason for creating this IT strategic plan. Specify what the plan will accomplish.

Example:

The purpose of this plan is to help our company achieve its IT Strategy. It is meant as a guide to decision making in IT. Incoming tasks to IT will be prioritized and executed (as much as possible) using this plan as a guide. While exceptions may occur, they should be exceptions, not the everyday rule.

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## Corporate Strategy

Describe the strategy of the enterprise. Obtain this information from the CEO or a publication from top executives.

Example:

Our business strategy is to retain existing customers through continuing to improve our existing product line as well as gain new customers through aggressive marketing campaigns. We may also expand the spending of our existing customers by developing other related product lines.

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## Business Initiatives to Support Corporate Strategy

List the business initiatives that are planned for the period that will support the business strategy.

Example:

Strategy Name	Business Initiative	Target Completion Date	Expected Impact
Retain Existing Customers	Loyalty Campaign	Q1	+10% Renewal Rate
	Mail Out Satisfaction Survey	Q3	+ 1% Renewal Rate
	"10% Off New Purchase" Campaign	Q3	+ \$1M Expanded Revenue
Gain New Customers	Expand into Asia	Q2	+ \$10M

			New Revenue
	Divide Existing Sales Territories	Q3	+ \$1M New Revenue
Expand Current Customer Spending	Develop Related Product X	Q4	+ \$5 Expanded Revenue

Strategy Name	Business Initiative	Target Completion Date	Expected Impact

## IT Strategy

Briefly describe your IT strategy. The IT strategy should have the business strategy as its basis. Spend at least a paragraph on each element below stating your IT Strategy:

Questions to consider:

- What kind and style of Organization will carry out the IT Strategy?
- What is the organization's operational profile?
- What is the organization's risk profile?
- Is the organization cost conscious?
- Is IT development or purchase focused?

Your strategy should address the following IT categories:

- Application development
- Hardware and infrastructure acquisition
- Data center builds and adjustments
- Security
- Compliance and governance
- Networks
- Data (Including Databases, Data Warehouses, Data sources and Big Data)

Example:

To enable our corporate strategy, our IT Strategy is to assist our marketing campaigns by enhancing our toolset in order to derive insight on brand and product performance by market segment and geography. Additionally, we will strengthen our product development support structure by automating product production capabilities.

## IT Strategic Plan to Support Business Initiatives

List the IT systems that are required to support the planned business initiatives. Ensure to include any necessary notes.

Example:

Business Initiative	IT System Required	Year(s) this project will take place	Ball Park Estimates			
			Time	Resources	Cost	Approved
Loyalty Campaign	E-mail Distribution System	2014	n/a	n/a	n/a	Yes
Mail Out Satisfaction Survey	E-mail Distribution System	2014 (See note 1)	40 days	2 FTE	\$10,000	No
10% Off "New Purchase" Campaign	E-mail Distribution System	2015 (See note 2)	20 days	1 FTE	\$5,000	Yes
All Campaigns	Campaign Reporting System	2014-2016 (See note 3)	200 days	2 FTE	\$10,000	Yes
Expand into Asia	Servers, Workstations	2016	40 days	3 FTE	\$50,000	Yes
Develop Related Product X	Product X	2016	200 days	10 FTE	\$100,000	Yes

### Related Notes:

1. Survey Capable. Our current e-mail distribution system is not capable of handling in-line survey questions. We will need to add support for this capability. We are assuming we will go with the simplest solution (link to a survey Web page) and will create our own survey instead of purchasing a survey package.
2. Coupon Capable. Our current e-mail distribution system is not capable of handling attachments or coupons. We will need to add support for this capability. We are assuming we will go with the simplest solution (embedding the coupon in the e-mail).
3. The new Campaign Reporting system will consist of the following project components:
  - a. Define brand/product performance metrics
  - b. Develop data warehouse architecture
  - c. Design/build data warehouse/data marts
  - d. Design/build ETL mechanisms
  - e. Design/build dashboards, queries, and reports

Business Initiative	IT System or Initiative Required	Year(s) this project will take place	Ball Park Estimates			
			Time (# Days)	Resources (# FTE)	Cost (\$)	Approved (Y/N)

## Key Performance Indicators

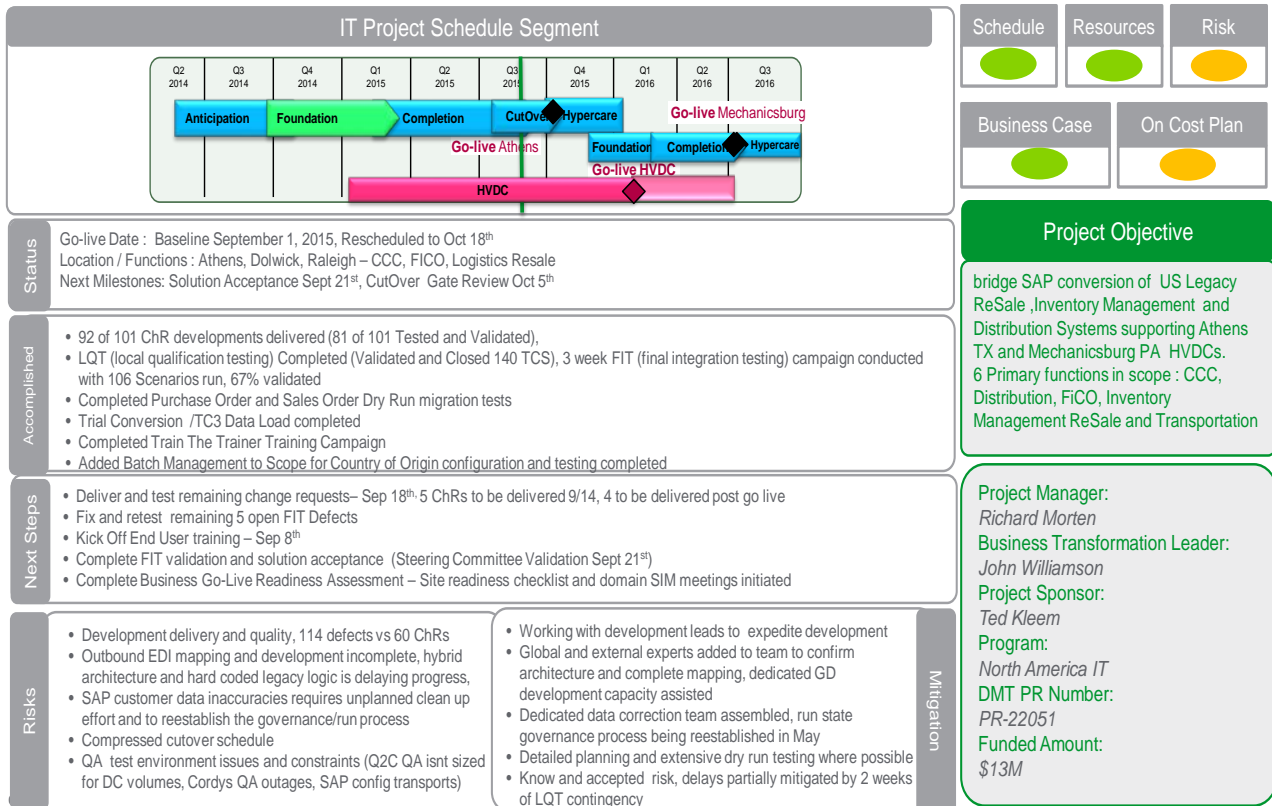
Insert a series of metrics on how you will measure the success of your plan. Metrics can be constructed in many different ways. Some things to consider however in any metric is: Ease of Read, Accuracy, Clarity of Terms & Meaning, and Take Aways. Using a red, green, yellow color indicator along with a printed percentage and name tag, can give a lot of information in a small space. Stay away from the use of approximations unless the metric is for estimations in general. Try to use acronyms only if the audience will clearly and quickly understand them. Consider the take away effect of the report...when the person sees this, what will they remember when they walk away?

Example:

Here is a sample of a monthly project update. There is a lot of information on this one page. However, in a 10 second time period, the viewer can determine if the project is on track, where it is in the schedule, whether the cost plan is on track, and who is in charge.

## Project Gemini

Reporting Period: 08 2015



## IT Strategic Plan – Roadmap Chart

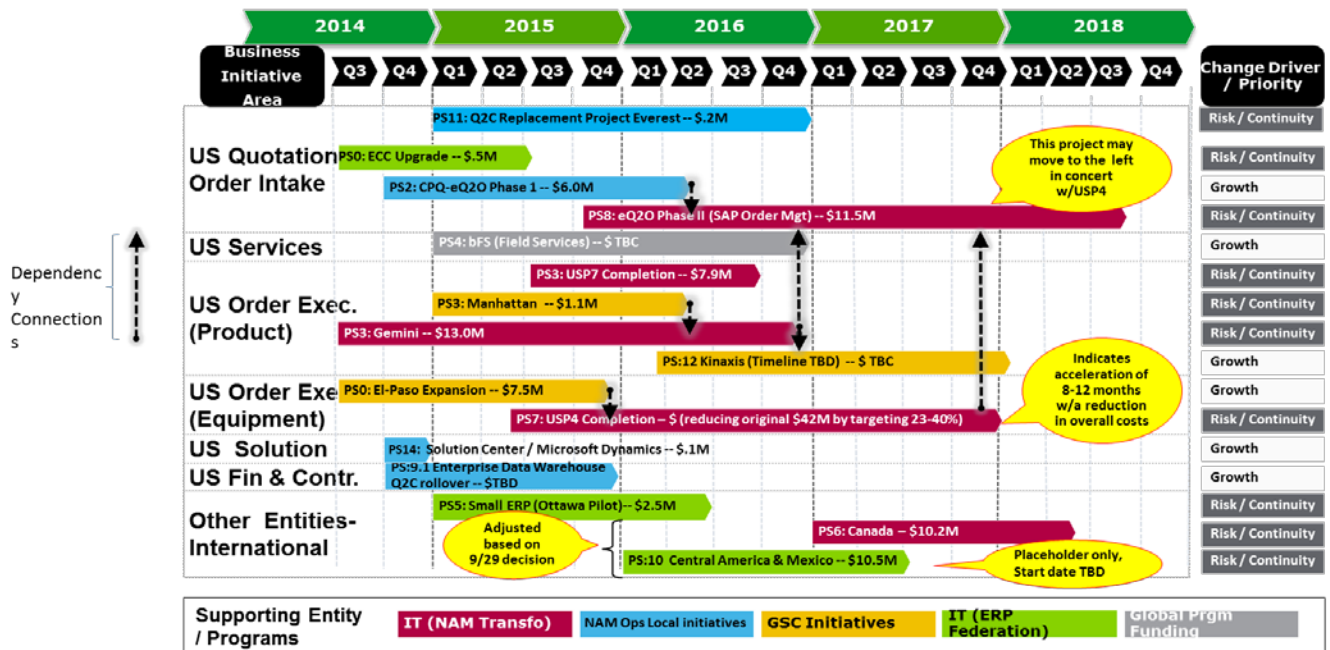
Insert a Roadmap Flow Chart (or some other graphical representation of your plan) to depict the schedule for implementing the approved IT systems. This plan ensures that resources are available for the projects at the time they are required. Categorize your plan into 1, 2, and 3 year strategy.

Example:

Figure 1: Roadmap Chart of IT Projects in support of the Corporate Strategic Horizon

# IT Strategic Roadmap

Proposed Risk-Continuity-Growth Prioritized Approach v4.4



## IT Strategy Execution Plan

How will you communicate the new IT Strategy to the Company? List the actions you will take with a brief detail of how you will implement the IT Strategy.

Example:

### Execution Plan and Actions Items

Action Item	Status
<b>No-Regret Projects</b>	
e2QO - Move forward, accelerate if possible	Moving Forward
bFS - Requirements (from Services) solidified, time and costing needs to be established	Global Team working on basic costs. Project Manager being assigned
Gemini - Move forward, apply continuous cost reduction practices.	Moving Forward
El Paso II - Move forward, accelerate if possible.	Moving Forward
EDW/BI - Move forward with Pre-Study to involve Finance and other business areas.	Initial research done on BI/7 opportunities ; Engage Pre-Study
<b>Other Decisions</b>	
Postpone Mexico - Stop project activity, including RFP, target 2016 for restart	Project Stopped
USP4 & 7 – Confirmed prioritization; accelerate if possible. Have risk mitigation plan for Q2C by IPO	Using current schedule accelerate USP4 pre-2018. Develop risk mitigation plan for Q2C
Phoenix Roadmap attendees represent decision body for ongoing planning & budgeting. Structured new Steering Committee Process to streamline reporting and decision making.	New Steering Comm governance process designed. Will be included in NAM Charter
eCommerce and other global programs - Researching the Planning & costing for eCommerce and associate program elements where they apply in NAM space	eCommerce being looked at for Gemini, bFS, Bridge (USP4 & 7), and Small ERP

**Figure 2: Execution Plan for the IT Strategic Plan**

1. Every board member and member of management should get a copy of the plan.
2. Consider distributing all (or highlights from) the plan to everyone in the organization. It's amazing how even the newest staff member gains quick context, appreciation, and meaning from review of the strategic plan.
3. Post your mission and vision and values statements on the walls of your main offices. Consider giving each employee a card with the statements (or highlights from them) on the card.
4. Publish portions of your plan in your regular newsletter, and advertising and marketing materials (brochures, ads, etc.).
5. Train board members and employees on portions of the plan during scheduled orientations.
6. Include portions of the plan in policies and procedures, including the employee manual.
7. Consider copies of the plan for major stakeholders, for example, funders/investors, trade associations, potential collaborators, vendors/suppliers, etc.

## IT Strategic Plan Summary

In a one to three paragraph summary, describe what it took to develop and write the IT Strategic Plan. What information was helpful? What information was missing or would have been important to know?

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Signatures:

CIO/IT Manager:

Date:

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CEO/President:

Date:

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