



# IT Leadership Academy

## Essential CIO Skills

*Course Outline*

*Sponsored by Robert Pamplin Jr. School of Business Administration*



**July, 2016**

## Introduction

For mid-size business leaders, IT is complex, expensive, critical and hard to do right. Effectiveness of their IT leader is critical for the success of any business. Having come up through technology ranks, most IT managers and Directors have strong technology skills but lack the business and communication skills, which are critical for their own, as well as their organization's continued success. Development of CIO skills has historically been a mystical, individually pursued and developed capability. Sadly, in Oregon, there is no facilitated training available that provides truly effective mentoring and coaching of for developing IT leaders.

Every business needs a measure of leadership that can align business and technology and provide stewardship of the company's technology portfolio. This can only be done by the role of the Chief Information Officer (CIO).

***At VIE, we define a CIO as someone who is highly accomplished in:***

- ***Business and Financial Skills***
- ***Leadership Skills***
- ***Communications and Relationship Building Skills***
- ***... and of course Business and Technology Strategies***

VIE's IT Leadership Academy is proud to offer this premium course to assist Oregon businesses in developing the right technology leadership skills in their organization.

## Who Will Benefit

This course is for you if you are part of the IT leadership team, an IT Director, or an IT Manager. You are somebody who prefers to manage your personal development proactively and prepare yourself for the top leadership position in IT in your company. This course has been developed to impart years of wisdom in IT strategic planning and management to people who aspire to lead the IT function at their organization.

There are a number of valuable self-development opportunities available for aspiring IT leaders in Portland. They include the SIM local chapter events, the SIM RLF program and other general leadership coaching. None of these provides the specialized training needed to develop into a true CIO. VIE uses our extensive CIO leadership experience to provide a learning experience that is unmatched in the industry. We do this through half-day, mastermind-style group meetings that provide discussion and learning from the rest of the group as well from our expert CIOs.

## Course Objectives

Upon completing this course, you will be able to:

- Understand the IT Pyramid of Success
- Increase your ability to communicate effectively with your internal business colleagues
- Understand the minimum business knowledge you need to be successful as an IT leader, including understanding key financial metrics
- Present your ideas effectively
- Learn how to build an effective service organization
- Organize your team for IT Project Management
- Understand how to build an effective IT team for your organization
- Take a strategic approach to managing IT
- Learn how to build an IT strategic plan aligned with business strategy
- List the latest technology trends that can have a major impact on your business
- Understand the fundamental strategies behind IT outsourcing
- Learn how to understand IT risks and manage them well

Other IT leadership topics that may be covered, time permitting:

- IT Metrics
- Differences between IT Manager, IT Director and CIO
- How to manage your IT Budget
- Measuring IT performance and customer satisfaction
- Retaining your IT team
- Business Continuity
- ERP systems selection
- IT Assessment - VIE IT Snapshot process
- How to manage your IT career
- CIO's view of Information Security
- Business Intelligence - how to get started

- How to manage your non-IT boss
- IT policies and procedures
- Managing the IT applications portfolio
- How to read Financial Statements
- How to value a company

## Course Times, Location and Class Format

This course will be offered at University of Portland's Westside campus located at 15220 NW Laidlaw Rd., Suite 230, Portland, OR 97229.

The class will consist of between 8 and 12 students. The class will meet once a month for half a day from 8am until noon. Between classes there will be reading and homework assignments to maximize learning opportunities. Limited individual coaching will be available to students as part of this course.

### General format for each class meeting:

- |   |                   |
|---|-------------------|
| • Networking and Continental Breakfast                                | 7:15am to 8am     |
| • <u>Segment 1 - Peer mastermind discussion</u>                       | 8am to 9:15am     |
| ○ Check in  |                   |
| ○ Hot button issue previously identified by student                   |                   |
| • Break   | 15 min            |
| • <u>Segment 2 - Topic Discussion lead by VIE CIO</u>                 | 9:30am to 10:45am |
| • Break   | 15 min            |
| • <u>Segment 3 - Case Study or Book discussion or Guest Lecture</u>   | 11am to 12noon    |
| ○ Homework Discussion (Book, Article assignments, Exercises assigned) |                   |

## Rough Schedule for the Year

Class	Topics Covered by Segment	Homework/ Reading assignments
1	1: Introduction, expectations, key challenges <b>2: Starting the Journey (MH)</b> <ul style="list-style-type: none"> <li>• IT Pyramid</li> <li>• Envisioning Success</li> <li>• IT Value Meter</li> </ul> 3: Case Study – Self Assessment	<i>Exercise: Self-Assessment</i>
2	1: Mastermind Segment <b>2: Changing the Conversation (MS)</b> <ul style="list-style-type: none"> <li>• Your Value vs. Your Perception</li> <li>• Who are your Critical Few?</li> <li>• Communicating in Business Language</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Guest Lecture - Presentation skills (MG)</li> </ul>	<i>Challenge Exercise: Changing the Conversation</i>
3	1: Mastermind Segment <b>2: Know your Business (MH)</b> <ul style="list-style-type: none"> <li>• How to get involved with your industry</li> <li>• How does your company compete?</li> <li>• What is your unique value to your business?</li> <li>• Get your butt out of IT and mingle with the natives</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Sample VIE IT Snapshot</li> </ul>	<i>Challenge Exercise: Get out of your comfort zone</i>
4	1: Mastermind Segment <b>2: Know Your Business' Numbers (TBD)</b> <ul style="list-style-type: none"> <li>• Financial Statements</li> <li>• Critical Ratios and what do they mean</li> <li>• Company Valuation</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Guest Lecture - how to manage your IT career (MG)</li> </ul>	<i>Challenge Exercise: Read and interpret your company's latest annual report</i>

Class	Topics Covered by Segment	Homework/ Reading assignments
5	1: Mastermind Segment <b>2: Leading a Service Organization (MH)</b> <ul style="list-style-type: none"> <li>• IT Governance – what is it, really?</li> <li>• Measuring Success</li> <li>• A Practical Approach to Service Management</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Presentation by students</li> </ul>	<i>Recommended Reading:</i> <a href="#">"Don't Just Lead, Govern: How Top-Performing Firms Govern IT"</a> by Peter Weill  <i>Challenge Exercise:</i> Create your service catalog
6	1: Mastermind Segment <b>2: Organizing for Project Management (MS)</b> <ul style="list-style-type: none"> <li>• Project Management Approaches</li> <li>• Lean, Agile, DevOps. What they mean and how to approach them.</li> <li>• Process Enabled or Process Bound?</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Presentation by students</li> </ul>	<i>Challenge Exercise:</i> Envision your execution environment
7	1: Mastermind Segment <b>2: You and Your Team (MS)</b> <ul style="list-style-type: none"> <li>• Organizing for Success</li> <li>• How are you spending your time?</li> <li>• Where are your service gaps?</li> <li>• What skills will be necessary next year? In three years?</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Book Discussion (MG)</li> </ul>	<i>Challenge Exercise:</i> Create an IT Resource Plan
8	1: Mastermind Segment <b>2: Taking a Strategic Approach to IT (MH)</b> <ul style="list-style-type: none"> <li>• Business and Technology Strategy Linkage</li> <li>• Business, Technology and Information Architecture</li> <li>• Strategic vs. Tactical Initiatives</li> <li>• Creating a strategic road map</li> <li>• Selling your strategy</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Book Discussion</li> </ul>	<i>Recommended Reading:</i> <a href="#">"The Art of the One-Page Strategy"</a> Gartner  <i>Challenge Exercise:</i> Create a 2-year strategic road map

Class	Topics Covered by Segment	Homework/ Reading assignments
9	1: Mastermind Segment <b>2: IT Outsourcing (MS)</b> <ul style="list-style-type: none"> <li>• Deciding when and how to outsource IT functions</li> <li>• Emerging IT Service providers</li> <li>• Contracting challenges</li> <li>• Selling your strategy</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Guest Lecture</li> </ul>	<i>Recommended Reading:</i> <a href="#">“The Outsourcing Continuum”</a> by Mike Scheuerman  <i>Challenge Exercise:</i> Which IT service can you outsource in your company? Why?
10	1: Mastermind Segment <b>2: Technology as a driver (TBD)</b> <ul style="list-style-type: none"> <li>• IoT, Cloud, Mobile, Social, Analytics as business disruptors</li> <li>• Socio-economic disruptors</li> <li>• Emerging challenges</li> </ul> 3: Case Study <ul style="list-style-type: none"> <li>• Guest Lecture</li> </ul>	<i>Recommended Reading:</i> <a href="#">The Second Machine Age: Work, Progress, and Prosperity in a Time of Brilliant Technologies</a> (Erik Brynjolfsson and Andrew McAfee, 2014)  <i>Challenge Exercise:</i> What technology forces will disrupt your industry?
11	1: Mastermind Segment <b>2: Hot Button Issues (TBD)</b> <ul style="list-style-type: none"> <li>• IT Risk Management</li> <li>• Deciding when and what to Outsource</li> <li>• Cloud Computing</li> <li>• Robots &amp; AI</li> <li>• Technology &amp; Society</li> <li>• Class sponsored topics</li> </ul> 3: Class Evaluation	<i>Recommended Reading:</i> <a href="#">The Glass Cage: Automation and Us</a> (Nicholas Carr, 2014)  <a href="#">“See Your Company Through the Eyes of a Hacker”</a> by Nathaniel C. Fick  <a href="#">"How Technology Is Destroying Jobs"</a> by David Rotman

## Books and other materials

### Books:

- [The Visible Ops Handbook: Implementing ITIL in 4 Practical and Auditable Steps](#) (Kevin Behr, Gene Kim, George Spafford, 2005)
- [Blind Spot](#) (Charlie Feld, 2010)
- [The CIO Paradox](#) (Martha Heller, 2012)
- [Implementing World Class IT Strategy](#) (Peter High, 2014)
- [Confessions of a Successful CIO](#) (Roberts/Watson, 2014)
- [The Glass Cage: Automation and Us](#) (Nicholas Carr, 2014)
- [Race Against The Machine: How the Digital Revolution is Accelerating Innovation, Driving Productivity, and Irreversibly Transforming Employment and the Economy](#) (Erik Brynjolfsson and Andrew McAfee, 2011)
- [The Second Machine Age: Work, Progress, and Prosperity in a Time of Brilliant Technologies](#) (Erik Brynjolfsson and Andrew McAfee, 2014)
- [The Edge](#) (Manoj Garg / Mike Scheuerman, 2016)

### Podcasts:

- The Future of Work (Jacob Morgan)  
[Interview with GE CIO Jim Fowler](#)

### Articles:

- ["10 Characteristics of extraordinary CIOs"](#) by Vala Afshar
- ["The Art of the One-Page Strategy"](#) Gartner
- ["Don't Just Lead, Govern: How Top-Performing Firms Govern IT"](#) by Peter Weill
- ["IT Doesn't Matter"](#) by Nicholas G. Carr
- ["How Is the Internet Changing the Way We Work?"](#) by Thomas W. Malone
- ["Digital Transformation: A Roadmap for Billion Dollar Organizations"](#) by MIT Center for Digital Business and Capgemini Consulting



- [“The Outsourcing Continuum”](#) by Mike Scheuerman
- [“See Your Company Through the Eyes of a Hacker”](#) by Nathaniel C. Fick
- [“How Technology Is Destroying Jobs”](#) by David Rotman

## Presented By VIE CIOs

VIE is a group of ex-CIOs who are passionate about developing IT talent to serve business. Throughout our careers, we have coached IT people to be the best that they can be. Using our collective leadership experience of over 500 years, we have developed a curriculum for aspiring IT leaders.



Mike Scheuerman is a CIO Consultant for Virtual Information Executives. He brings over thirty-five years of senior executive leadership skills and technical expertise with domestic and international operations to VIE's clients. He has worked in multiple industries, including financial services, health care, high tech manufacturing and higher education. Mike's Information Technology experience covers a broad array of skills, including Outsourcing Management, Customer Relationship Management, Supply Chain Management, Business Intelligence and Infrastructure Management. He is noted for creating strategic business and technology plans that drive significant growth while also focusing on cost containment. Mike has served as CIO at multiple organizations including Northwest Corporate

Credit Union, Providence Medical Center Seattle, Kettle Foods and Portland Art Museum.



Marc Hallquist is VIE's Practice Director for Manufacturing and Distribution. A CIO Consultant with Virtual Information Executives (VIE), Marc Hallquist specializes in IT-enabled business integration and transformation. He blends a solid foundation in "Big 4" consulting with a real-world understanding of the challenges and opportunities of enterprise IT. Marc provides clients with strategic advice as well as practical operational expertise in business integration, program management, IT service management, and solutions development & implementation. He leads teams characterized by a supportive, driven work environment focused on achieving program objectives. He views systems holistically, addressing people and process aspects as well as technology. Marc's skills are

applicable across industries, with IT leadership or consulting experience in Manufacturing, Distribution and Technology. Marc has served as CIO at multiple organizations including Columbia Distributing, Young's Market NW and PAE Engineers.



Manoj Garg is the Founder and Managing Partner of Virtual Information Executives, a consulting firm that specializes in helping clients achieve breakthrough business results through IT leadership. Manoj brings over thirty years of senior executive leadership skills and technology management experience with domestic and international operations to VIE's clients. Manoj's Information Technology (IT) experience covers a broad array of skills, including Large Scale Technology Infrastructure Management, Outsourcing Management, Information Security Management, Program Management and Enterprise Resource Planning. Manoj served as the Founding CIO at WebEx Communications.