

University of Bridgeport and SENAC University - Four (4) Day Professional Development Seminar –

June 6 - 9, 2011 @ University of Bridgeport

Seminar Number: PDIT - 02

Implementing Information Technology (IT) Strategy and Governance: A Practical Guide to World Class IT Management Using Current and Emerging Best Practices for Competitive Advantage

““How to Align, Plan, Invest, Implement, Manage and Govern IT Resources and Assets for Improved Competitive Survival, Profitability and Control in Global Enterprises.””

Overview

The issues, opportunities and challenges of effectively governing an organization’s Information Technology (IT) demands and resources has become a major concern of the Board and executive management in enterprises on a global basis. Information technology (IT) has become an integral part of a business and is fundamental to support, sustain and grow the business. Therefore, an integrated and comprehensive approach to the governance of IT and its resources is becoming critical to more effectively align, invest, measure, deploy and sustain the strategic and tactical direction and value proposition of IT in support of the business.

Based on a study of over 250 enterprises in 23 countries, Dr. Peter Weill stated, “Firms with superior IT Governance had 20% higher profits than firms with poor governance given the same strategic objectives.”

The seminar presents an integrated approach to IT governance for planning, deploying and sustaining a successful IT governance environment and drills down into its major components in more detail by guiding the participant through a comprehensive “How to” and pragmatic step-by-step IT Governance framework and roadmap, which addresses the following goals:

- Align, integrate and formalize IT portfolio investments and priorities more consistently and closely with the business
- Optimize the utilization of a firm’s IT assets and resources
- Ensure that IT effectively delivers on its strategic, operational and project plans, objectives and commitments
- Establish, clarify and/or improve accountability of all constituents
- Manage risks, change and contingencies proactively
- Improve IT organizational performance, relationship management between IT and the user community, audit-ability, compliance and maturity

The material leverages and integrates current and emerging industry best practices, standards, guidelines and world class company case studies.

The Integrated IT Governance Framework and Roadmap, illustrated below, will be covered in detail in the seminar:

Integrated IT Governance Framework & Roadmap

Identifies the Major Areas that are addressed In the Seminar on the journey to a higher level of IT Governance maturity and effectiveness

Area of Work	Description/Components	Deliverables/ References
Business Plan/ Objectives (Demand Management & Alignment)	<ul style="list-style-type: none"> • Strategic Business Plan – Vision, Objectives, Financials, Operations, SWOT, Imperatives (Must Do's), Initiatives (Alternatives that Support Imperatives), etc. • Capital Planning/Expense Planning & Budgeting • Business Performance Management (Key Metrics) – Balanced Scorecard • Executive and Other Steering & Review Councils; Organization Structure 	<ul style="list-style-type: none"> • Plan Document • Financials • Balanced Scorecard/Metrics • BCG, Porter, Hamel
IT Plan, Objectives, Portfolio Investment and Approvals (Demand Management & Alignment)	<ul style="list-style-type: none"> • IT Plan is aligned with the Business Plan – IT Capital/Expense Budget, Opportunity vs. Risks • IT portfolio investment, rationalization, selection, prioritization, funding and approval (Portfolio Management Model (for New, Change Programs and Projects and/or Operational and Infrastructure Functions) • IT Performance Management (Define Metrics and Measurement Criteria) 	<ul style="list-style-type: none"> • IT Strategic/Tactical Plan/Metrics • Portfolio Mgt. Model (Investment Criteria); ITIM • Engagement Model - Roles • Business Rules & Authorization • McFarlan, Cash, Luftman, Popper, Selig
IT Plan Execution & Delivery (Resource & Execution Management)	<ul style="list-style-type: none"> • Program, Project and Operating Plans (Capital Plans, Project Plans and Budgets) • Policies, Standards, Guidelines & Processes (e.g. Management Control, Enterprise Architecture, Security, PMO, ITSM/ITIL, etc.) • Processes (PMO, Help Desk, Security, Administrative SOPs, Workflows, Change, Risk, etc.) • Financial, program, project, application, maintenance and operational accountability 	<ul style="list-style-type: none"> • Assess Implications of PMMM, PMBOK, CMM, ITIL, SDLC, CoBIT, Security (ISO 17799), Prince2, eSCM, OMBOK Frameworks • Infrastructure & Operational Integrity, Continuity & Security
Performance Management, Controls, Risk, Compliance and Vendor Management (Execution Management)	<ul style="list-style-type: none"> • Manage and measure plans, budgets programs, projects, operations & risks • Define and track key performance indicators (KPI) • Compare plans to actuals and take appropriate corrective actions • Outsourcing and Vendor Selection, Tracking, Measurement and Management • Business and IT Continuity, Security, Contingency and Disaster Recovery 	<ul style="list-style-type: none"> • Balanced Scorecard & KPIs • Performance Management • RFI, RFQ, RFP and Contract Management, IAOP, ITesq • Sarbanes-Oxley++ Compliance • Management Controls/COBIT
People Development, Continuous Process Improvement & Learning	<ul style="list-style-type: none"> • Human Capital Development • Organizational, Project & Operational Maturity Models and Standards • Managing Change and Transformation (e.g. culture, interoperability, Virtual Global Teams) • Training and Certification (e.g. Individual and Organization) • Knowledge Management and Lesson Learned • Quantitative and Qualitative Benefits and Value Propositions 	<ul style="list-style-type: none"> • Adopt Current and Emerging Industry and Government Best Practices Standards & Guidelines • PCMM, OMB 300; ISO, ITIM • Career Development and Certification

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Learning Objectives

- Analyze the issues, challenges and growing importance of IT governance as part of enterprise governance
- Develop, deploy and sustain an effective IT governance organization, culture, policy, processes, methodologies, tools and metrics
- Manage, evaluate, estimate, prioritize, fund, measure, assign and track requests for IT investments and services in a more consistent, effective and flexible manner with the business

- Allocate IT resources to the highest business value added activities in support of the business (e.g. portfolio investment management)
- Establish and/or improve IT decision rights, ownership and accountability
- Improve organizational performance, responsiveness, reliability , maturity and staff development
- Provide an overview of relevant current and emerging industry best practices, standards, certifications and frameworks (e.g. ITIM, PMMM, PMBOK, CMMI, ITIL, COBIT, Prince 2, Six Sigma, select ISO standards, ITsqc(eSCM), IAOP(COP), CISA, CISM, CGEIT and others)
- Improve regulatory and legal compliance requirements in a cost effective manner

Key Topics Covered

- Why IT governance? Driving forces and challenges; The Board and Executives View of IT governance; Who benefits and what are the value propositions? Growing role and importance of IT Governance as part of a superior Enterprise Governance environment
- Overview of Industry Best Practice Standards, Model and Guidelines covering some aspect of IT governance – PMBOK, PMMM, CMMI, ITIL, Security, select ISO standards, COBIT, Prince2, Six Sigma, CISA, CISM, CGEIT, ITsqc and others)
- IT Governance Framework and Roadmap; Key Governance Processes- Planning, Execution, Performance Management and Controls, Executive Steering & Governance Groups, Sourcing, People Development, Risk Assessment and Mitigation, etc.
- Principles and Practices for Business/IT Alignment Excellence; Business and IT Plans, Investment/Portfolio Management Criteria; IT Engagement Model; Balanced Scorecard, Metrics and related IT Measurements
- Principles and Practices for Program/Project Management Excellence; PM Life Cycle Phases and Templates; PM Metrics; PMO
- Principles and Practices IT Service Management Excellence; ITIL (IT Infrastructure Library – V2 and V3) and its Value; Metrics; Work Flows; Business Rules; Business/IT Continuity and Disaster Recovery
- Principles and Practices of Strategic Sourcing and Vendor Management Excellence: Business Case for Sourcing, Vendor Selection, Negotiations, Contract and Agreement Types, Key Negotiations Points, Post Contract Management, Transition Planning, Exit Strategies, etc.
- Principles and Practices for Excellence in Performance Management, Controls, Risk Management and Enabling Technologies
- Lessons Learned and Critical Success factors
- Select Case Studies

Benefits of the Seminar

- Apply the lessons learned from this seminar to plan, manage, deploy and sustain an effective and robust IT Governance framework and develop a successful approach for your organization
- Be exposed to select current and emerging industry and government best practices and select world class company case studies
- Sharpen and refine your knowledge, competencies and increase your value
- Reduce stress for yourself and other stakeholders
- Understand your role in the IT Governance, regardless of whether you are a Board member, CEO, CIO, CTO, manager or professional
- Help you achieve greater success in your work, regardless of whether you...
 - Know a lot about IT Governance
 - Know very little about IT Governance
 - Are responsible for developing, enforcing and/improving some aspect of IT Governance

- Answer as many questions as the allotted time will allow

Required Course Material

1. Gad J. Selig, **IT Governance Courseware PowerPoint Workbook**, GPS Group, Inc, Fairfield, CT, 2010.
2. Gad J. Selig, **Implementing IT Governance: A Practical Guide to Global Best Practices in IT Management**, Van Haren Publishing, 2008, ISBN # 978-90-8753-119-5

Meet the Instructor



Dr. Gad J. Selig, PMP, COP

Founder and Managing Partner, GPS Group, Inc. & Associate Dean, Business Development and Outreach, University of Bridgeport

E-mail: gjselig@optonline.net or gadselig@bridgeport.edu

Dr. Selig is the Associate Dean for Business Development and Outreach in the Graduate Studies and Research Division of the University of Bridgeport in collaboration with Connecticut Innovations. He is also the Director of the new CTech IncUBator @ University of Bridgeport.

Formerly, he was the Director, MS in Technology Management and Dual Graduate Business and Engineering Degree Programs. He earned degrees from City, Columbia, and Pace Universities in Economics, Engineering, and Business. He has authored four books and over 70 articles, chapters in books, conference proceedings and presentations. He is a dynamic and popular in demand speaker at industry conferences and corporate events in the U.S. and abroad.

Dr. Gad J. Selig is Managing Partner and founder of GPS Group, Inc., a consulting, research and education firm that focuses on strategic marketing and growth, business and technology transformation, new product development, product management and innovation, IT strategy and governance, program/project management and strategic sourcing issues and opportunities. Select clients include Fortune 500 companies and government agencies such as: ATMI, Air Products & Chemicals, Bank General of Luxembourg, Bridgeport Hospital, BlueShield of California, Bristol-Myers Squibb, Cendant, Cigna, Columbia University Graduate School of Business, CA (Computer Associates), Daston Corp., First Energy (GPU Telecomm.), Fuji Film, USA, GE Aircraft Engines, IAOP, Intel, GSA's Federal Technology Services, JPMorganChase, Keyspan Energy (National Grid), Peoples United Bank, Sprint (Nextel), Purdue Pharma, Robbins-Gioia, Syracuse University, Starwood Hotels and Resorts, TDK and Verizon.

Dr. Selig has thirty+ years of diversified domestic/international executive, management and consulting experience with both Fortune 500 and smaller organizations in multiple industries. His experience includes: marketing, sales, planning, operations, business development, mergers and acquisitions, general management (with full P & L responsibility), systems/network integration, strategic sourcing and outsourcing, MIS/CIO, electronic commerce, product development, project management, business process transformation, governance and entrepreneurship.

Dr. Selig is a Board member of the CTech IncUBator @ University of Bridgeport and has been a Board member of Telco Research, BIS Group, LTD. and AGS. He is a member of: the Academy of Management, Society for Information Management (SIM), Project Management Institute (PMI), ASEE, IAOP and ISACA. He holds a Top Secret Clearance with the U.S. Federal Government.

Class Schedule – Day 1

Introductions – 9 - 9:30AM

Executive Summary – 9:30 - 10:30AM

- Objectives
- Why Do Organizations Need an IT/Business Governance Policy and Process?
- The Board and CEO Roles in IT Governance
- Executive's View of IT
- Strategic Value Proposition Alternatives for Corporate Focus
- Definition and Purpose of IT Governance
- Enterprise Governance & IT Governance
- Key IT Resources and Functions to be Managed
- IT Governance Assessment Maturity Model
- Three Critical Pillars of IT Governance
- Key IT Governance Strategy and Resource Decisions
- Integrated IT Governance Framework and Roadmap
- Key Governance Roles, Responsibilities, Accountability & Decision Categories
- IT Governance Decision Rights
- Business and IT Demand Management Classifications
- Balanced Score Card for Business and IT
- Leadership and Other Prerequisites for Creating a Successful IT Governance Program

Break – 10:30AM – 10:45AM

Executive Summary (Continued) – 10:45AM – 12:00Noon

- How Much Governance is Required? When is Enough, Enough?
- Results of Ineffective IT governance Can Be Devastating
- Strategic IT Investment Alternatives
- Essential Skills and Competencies Needed to Make IT Governance Successful
- Key Components of Managing Change Proactively
- Avoiding Implementation Pitfalls
- Enabling Technologies to Improve IT Governance
- A Generic Governance Process Improvement Model
- A First Step – Understand Current Maturity of IT Governance and Its Major Components
- Steps in Making IT Governance Real
- Future State of IT Governance – A Blueprint
- Summary

Lunch – 12Noon -1PM

2.0 Integrated IT Governance Framework and Roadmap – 1:00PM – 2:30PM

- Objectives
- Benefits of Using an Integrated IT Governance Framework

- Integrated IT Governance Framework and Roadmap
- Select Examples of Current and Emerging Business/IT Strategy and Governance Best Practice Reference Models, Frameworks and Standards
- Summary

Break – 2:30 – 2:45PM

3.0 Business/IT Alignment Excellence – 2:45 – 4PM

- Objectives
- The Board's Role in Driving Business/ IT Alignment
- Principles of Aligning IT to the Business More Effectively
- Business and IT Plan Integration Flow
- Business and IT Strategy Development Framework and Outline
- Business & IT Strategic Plan Outline, Cycle & Integration
- IT/Business Alignment , Portfolio Management, PM/SDLC and Operations Triangle
- The Five Stages of IT Investment (Portfolio) Management Maturity
- Strategic IT Investment Portfolio Alternatives
- IT Engagement (Relationship) Model
- Manufacturing Company Business/IT Strategic/Annual and Project Plan Alignment Process
- Summary
- Case Study – Global Insurance Company

Summary - Day 1 – 4PM - 4:30PM

- Interactive Work Session

Class Schedule – Day 2

Questions and Discussion – Day 1:9:00AM – 9:30 AM

4.0 Program/Project Management (PM) Excellence – 9:30 – 10:30AM

- Objectives
- Value Propositions of PM from Leading Organizations
- Principle for Achieving Excellence in Program/Project Management
- PM Maturity Assessment Model
- Linking IT/Business Plans to PM and Beyond
- PM Life Cycle Phases, Components and Key Templates
- IT Demand Management Gate Process Flow and Project Selection and Prioritization Criteria
- Fast Track versus Complex PM Initiatives (Scalable and Flexible Processes)
- PM Governance and Escalation Framework
- PM Metrics & KPIs – Mandatory and Discretionary

- The Roles of the Program Management Office (PMO) & Company Example
- Case Study – Financial Services Company

Break 10:30AM – 10:45AM

4.0 Program/Project Management (PM) Excellence (Continued) - 10:45AM – 12 Noon

- SAP Case
- IT Governance Case – Financial Services
- Overview - PM Best Practice Companies
- Essential Skills for PM
- The Major Causes of Project Management Failure
- The Cost of PM Failure
- Program/Project Type Scale Matrix
- Illustrative PM Organization – Global Organization
- Summary
- Case Study – SAP – Manufacturing Company

Lunch - 12 Noon – 1PM

5.0 IT Service Management (ITSM) Excellence (includes ITIL V2 & V3) – 1:00PM – 2:30PM

- Objectives
- Principles for Achieving IT Service Management and Excellence
- Benefits of IT Service Management
- What is ITIL and Why is ITIL Different?
- The ITIL Value Proposition – Company Examples
- ISO/IEC 20000 IT Service Management
- ITIL Framework – Overview of V2 Processes
- ITIL Framework – Overview of V3 Phases, Processes & Functions
- Steps in Making ITSM & ITIL Real

Break – 2:30PM – 2:45PM

5.0 IT Service Management (ITSM) Excellence (includes ITIL) (Continued) - 2:45PM – 4PM

- ISO 17799 & ISO 27000 - IT Security
- IT Service Management Assessment Maturity Model & Ranking Matrix
- Select ITSM Metrics, including SLAs
- Potential Issues with ITIL
- Starting an ITIL Initiative – Where to Begin?
- Enabling Technology Attributes for ITSM & ITIL
- Summary
- Case - World Class Consumer Goods Company

Summary - Day 2 – 4PM - 4:30PM

- Appendix 1 – Framework for Managing Accelerated Change and Transformation

Class Schedule – Day 3

Questions and Discussion – Day 2 – 9:00AM – 9:30 AM

6.0 Strategic Sourcing, Outsourcing and Vendor Management Excellence - 9:30 – 10:30AM

- Objectives
- The Changing Nature of Work
- The IT Balancing Dilemma
- The Modular Corporation
- The Global Sourcing Market and Key Vendors and Clients
- Strategic, Value and Delivery/Execution Questions for Sourcing
- Major Outsourcing Trends, Drivers, Issues and Challenges
- Differences Between Domestic and Off Shore Deals
- Strategic
- Sourcing Life Cycle Roadmap
- Select Sourcing Models – Pros & Cons

Break -10:30AM -10:45AM

6.0 Strategic Sourcing, Outsourcing and Vendor Management Excellence (Continued) – 10:45AM – 12:00Noon

- Outsourcing Views –From a Vendor and Customer Perspective
- The Sourcing Business Case
- RFIs, RFQs and RFPs
- Vendor Selection Process Flow
- Key Vendor Evaluation Criteria
- Major Negotiations and Contracting Pointers
- Potential Sourcing Risks and Mitigation
- Key Governance Roles, Processes and KPIs
- Transition Management and Checklist
- Exit Strategies
- Do's and Don'ts of Outsourcing
- Summary Steps in Vendor/Outsourcing Selection, Contract Negotiations and Management
- Case Study – Manufacturing Company

Lunch - 12 Noon – 1PM

7.0 Performance Management, Management Controls Risk Management &Enabling Technologies – 1:00PM – 2:30PM

- Objectives
- Principles for Achieving Performance Management, Management Control and Risk Management Excellence
- What Key Performance Indicators Should Be Tracked?
- Linking Critical Success Factors to Key Performance Indicators
- Governance Calendar and Balanced Scorecard
- Select Examples of KPIs & Dash Boards in Support of IT Governance & Its Major Components

- Key IT Management Controls & CoBiT
- Risk Assessment, Management and Mitigation
- Business and IT Continuity and Contingency Plan Outline
- Enabling Technologies to Improve IT Governance
- Summary
- Case Study – Global Software Company

Break – 2:30 – 2:45PM

8.0 Summary, lessons Learned & Critical Success

Factors – 2:45PM – 4:00 PM

- Migration Plan for Making IT Governance Real & Sustainable
- Lessons Learned
- Critical Success Factors
- Personal Action Plan & Next Steps
- Wrap Up

Class Schedule – Day 4

9:30AM –12:00 PM - Company # 1 Visit

12:00PM – 1:30 PM - Lunch / Travel to Company # 2

1:30PM – 4:00 PM - Company #2 Visit

4:00 PM – Depart

Contact: For more information, please contact:

Dr. Gad J. Selig, PMP, COP

Associate Dean, Business Development and Outreach

Division of Graduate Studies and Research Division

University of Bridgeport

230 University Avenue

Bridgeport, CT 06604

E-mail: gadselig@bridgeport.edu

Office Telephone: 203 – 576 - 4870