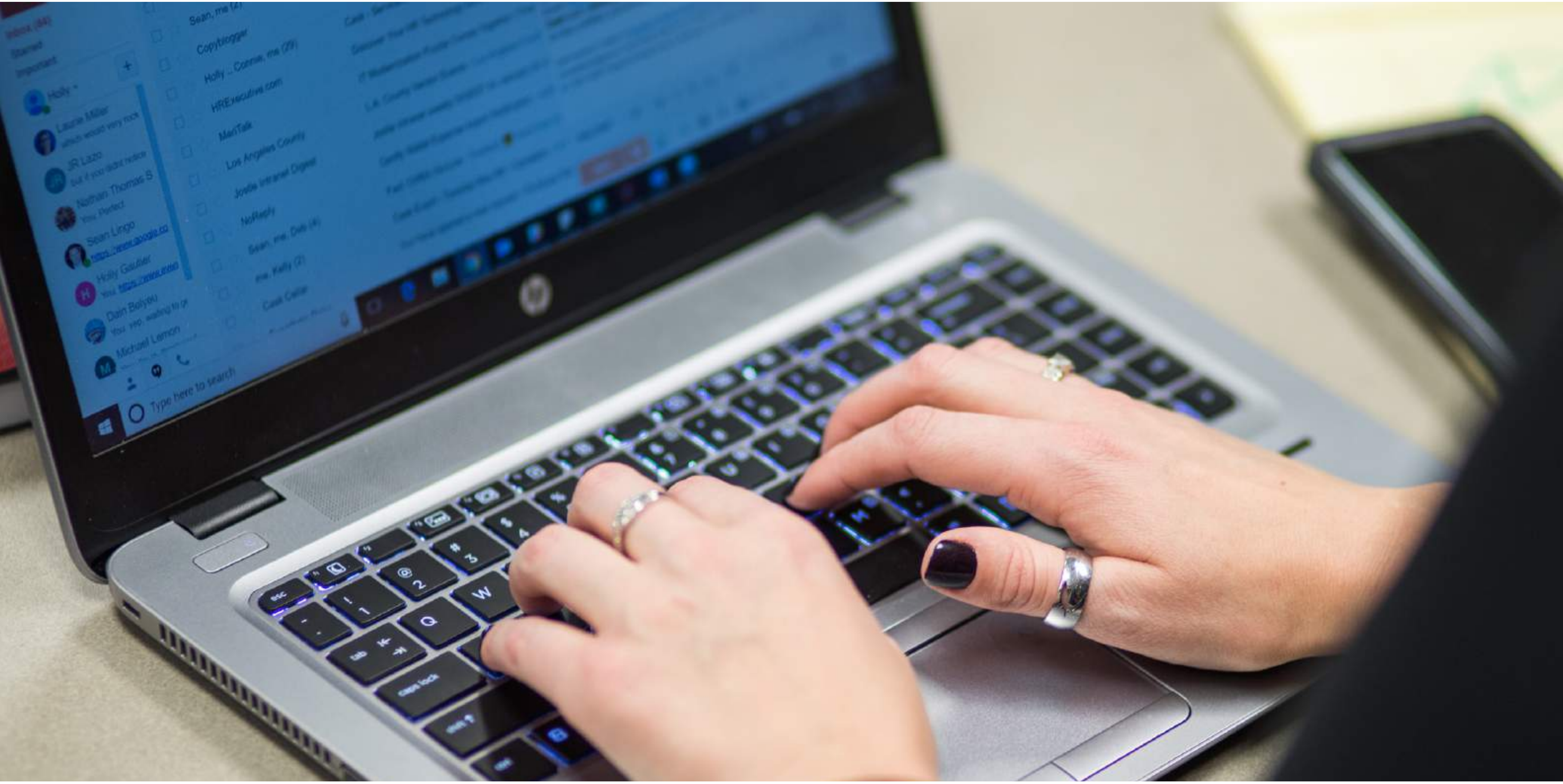

Cask

The Business of IT:

Why Running IT Like a Business Matters More Than You Realize

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ABOUT THE AUTHOR

DALE LANDOWSKI

Dale Landowski is a Principal Consultant at Cask and has 20 + years of extensive experience in developing and delivering business aligned services and solutions.

Dale is a champion for extending the IT value chain through the use of End-to-End Services tied to investment based strategies that provides stronger linkage of business needs to the underlying technology, processes, information and support capabilities.

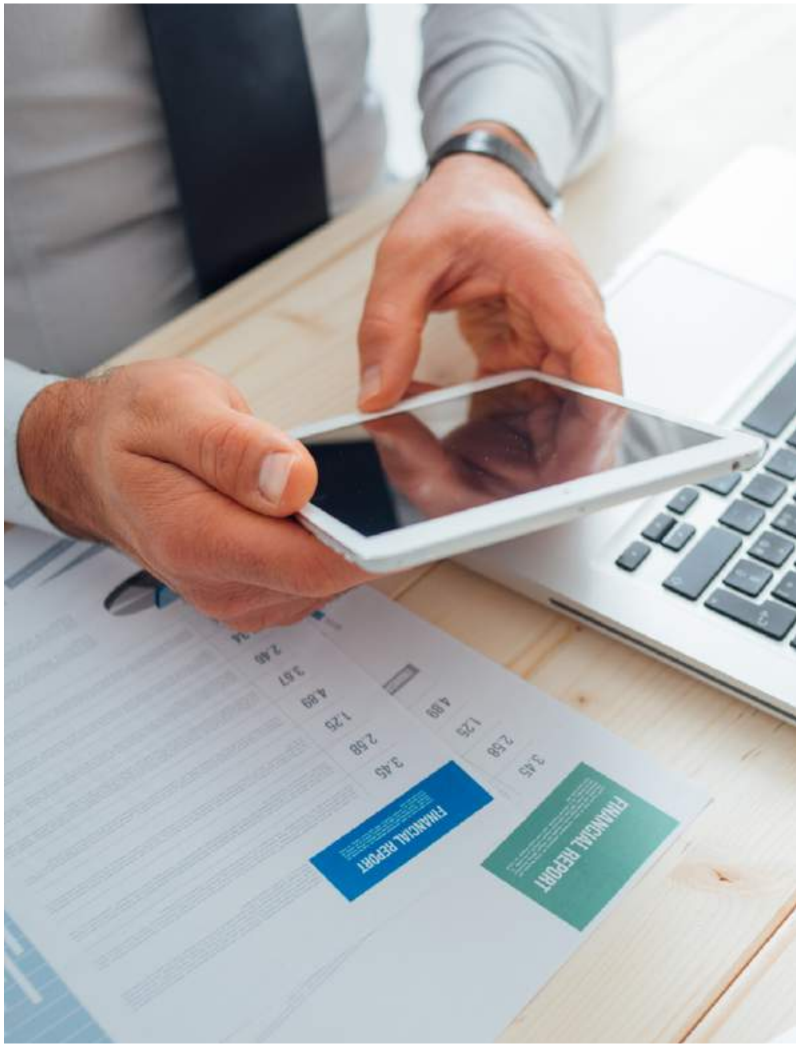
In a world driven by IT, IT needs to run IT like a business.

1 RUNNING IT LIKE A BUSINESS

In a world driven by IT, IT needs to run IT like a business. A lofty statement, perhaps, and something you've probably heard before. But what does it really mean to run IT like a business?

Most IT organizations have grown organically, not planned and then built for the purpose of managing technology necessary to support a business function or agency operation. For a long time that was good enough. But, as IT becomes a bigger and bigger part of an organization's ability to compete in the marketplace, the stakes are much higher. Focusing primarily on technology as an adjunct to your organization is no longer enough to be successful, or worse, it can actually impair your business's performance.

Technology focused organizations are good at delivering technology, but don't have strong competencies in other business areas. This is where Cask's Business of IT framework can help and why it matters.



Even though your customers may be asking for technology-related products, what they really value is service.

Running IT like a business means the IT organization has all the elements of a fully functioning business operation. This includes capabilities in traditional business functions like:

- Strategic Planning
- Sales and Marketing
- Product and Service Management
- Investment (Portfolio) Management
- Business Planning (Forecast and Capacity)
- Operations
- Financial Management
- Back-office Functions

One area that gets neglected is sales and marketing. Start thinking about leveraging sales and marketing techniques to sell your products and services because if you're not selling, you're likely not engaging with your customers to communicate value, and you're missing an opportunity to truly understand what they need. If you don't have a good understanding of their needs, you're likely missing the mark on delivering IT in a way that meets those needs.

But before you jump into solving for that, you need to be clear on what IT is selling.

WHY IT NEEDS TO SELL SERVICES

Are you selling products or are you selling services? This is a very important distinction and it's where many IT organizations get tripped up. Even though your customers may be asking for technology related products, what they really value is service. For example, they may be asking for bigger and faster storage technology, but what they really value is a storage service that includes on demand, end-to-end delivery of the storage they need to do their job and support their customers. If they don't get this from the IT department, they'll go to another supplier that markets and sells "on demand" storage services. In this scenario, if you're not selling storage services, you're at a significant disadvantage.

If your customers are looking for outside services that IT doesn't provide (or doesn't provide in a way they need) and you're not part of those discussions, your IT organization is likely suffering from poor value perception. This is how shadow IT happens.

Ultimately, providing services unlocks a very important benefit of the Business of IT: it puts you in a better position to market and sell your value and brand because you provide what your customers need, and they understand what you can do for them. This sets you up to be a valued business partner. A partner that they will readily engage with to help solve their business challenges.

Cask has developed a Business of IT (BofIT) framework to help organizations tackle the challenges of running IT like a business and becoming a trusted business partner.

Figure 1:
The Business of IT Framework

In this ebook we'll explore the Business of IT and why IT matters more than ever. This starts with understanding what matters to your customers and business partners and then enabling a business model that can answer some key questions:

1) How do I communicate value to my business partners and constituency?

2) How are my services perceived by users and customers?

3) How do I work more effectively with business partners to forecast and manage demand?

4) How can I track and manage costs to demonstrate value to your partners?

5) How do I prioritize projects and work efforts in the context of organizational constraints and capacities?

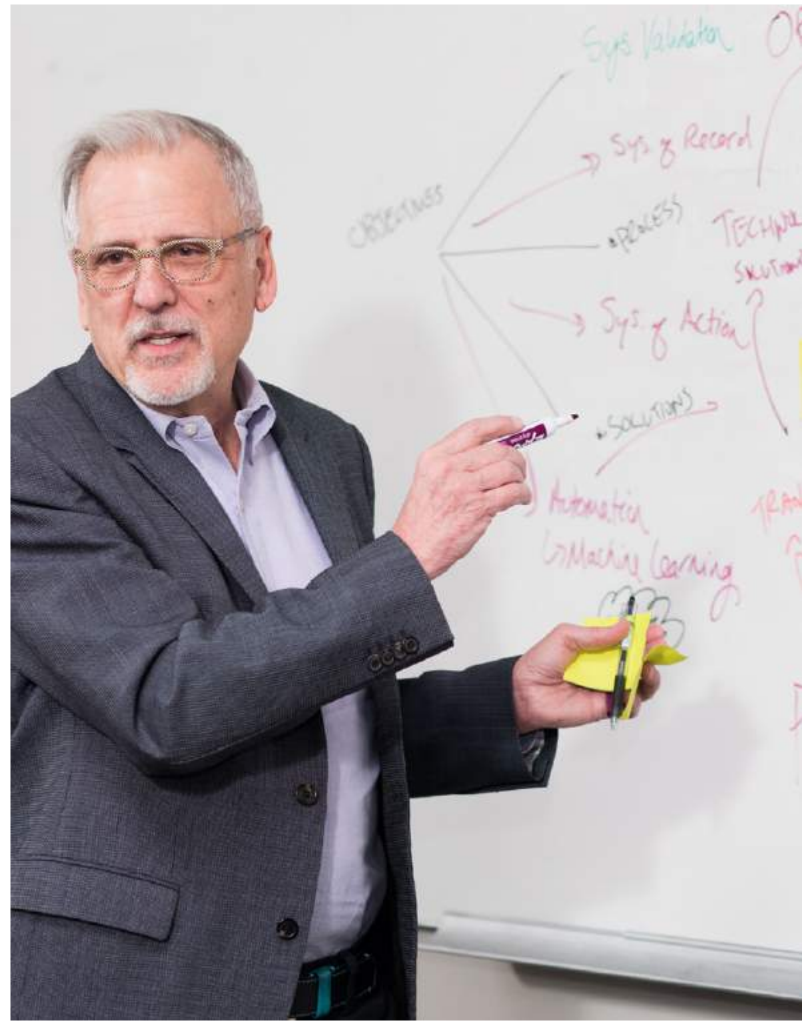
6) How do I make good investment decisions?

7) How do I track and manage benefit realization of investments I make?

2 COMMUNICATING VALUE

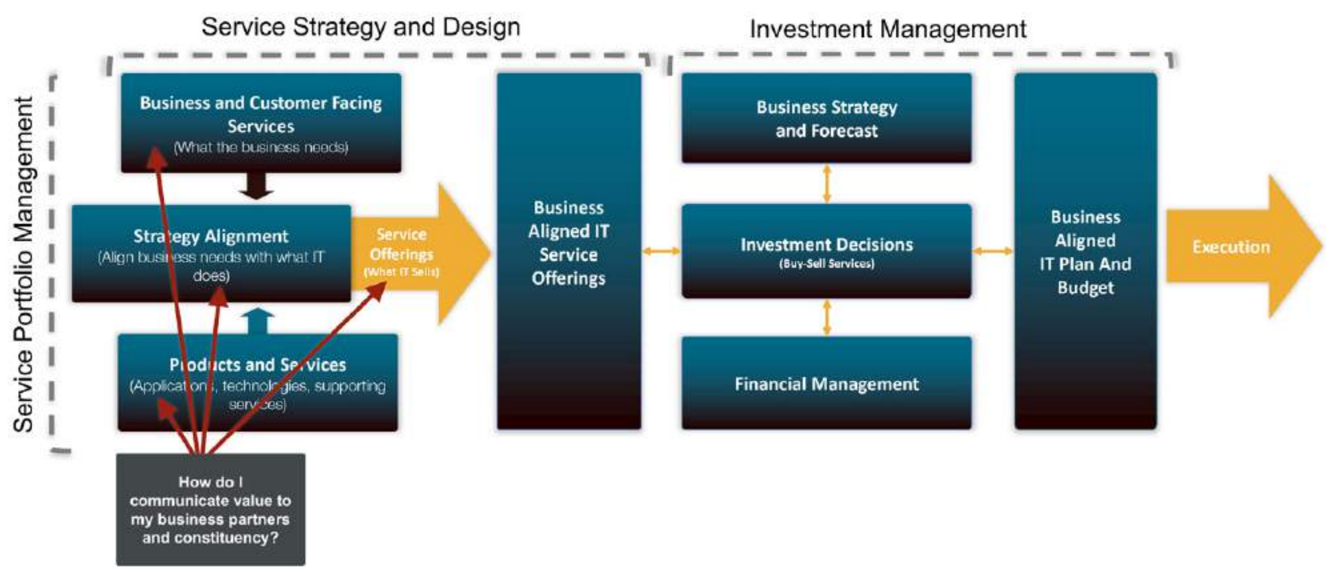
One of the more challenging business problems IT organizations face is communicating value to customers and business partners. It is difficult for technology focused organizations to build those bridges when they are stuck in their own jargon and work processes. This is why selling services is so important. When properly defined, services provide the value linkage between what IT does and what the customer needs.

In the previous chapter, we touched on the difference between selling technology and selling services and made the argument that running IT like a business must include selling services to your customers. Even in situations where a product is provided directly to a customer (e.g.; a mobile phone or PC), the customer expects an end-to-end service that includes easy to use ordering, delivery and support across the entire life-cycle of that service.



Using the business of IT framework as a reference, we can see that communicating value starts with aligning what IT does with what the business needs, and then developing end-to-end services that IT sells.

Figure 2:
Communicating Value



Let's unpack an example of a service that, on the surface, appears to be strictly a product: a company-provided mobile phone.

In this case:

- Apple provides the phone (the product).
- A mobile telecommunication company provides the cellular service.
- The App store brokers mobile applications.
- A 3rd party specialist provides device management and security services.
- Accounts Payable pays the bill
- Finance provides an allocation to the appropriate cost center
- The IT organization provides a catalog (to order the phone) and management of all other services and providers across the lifecycle of the device (procurement to retirement).

All of this is bundled up as an end-to-end service that should look seamless to the customer.

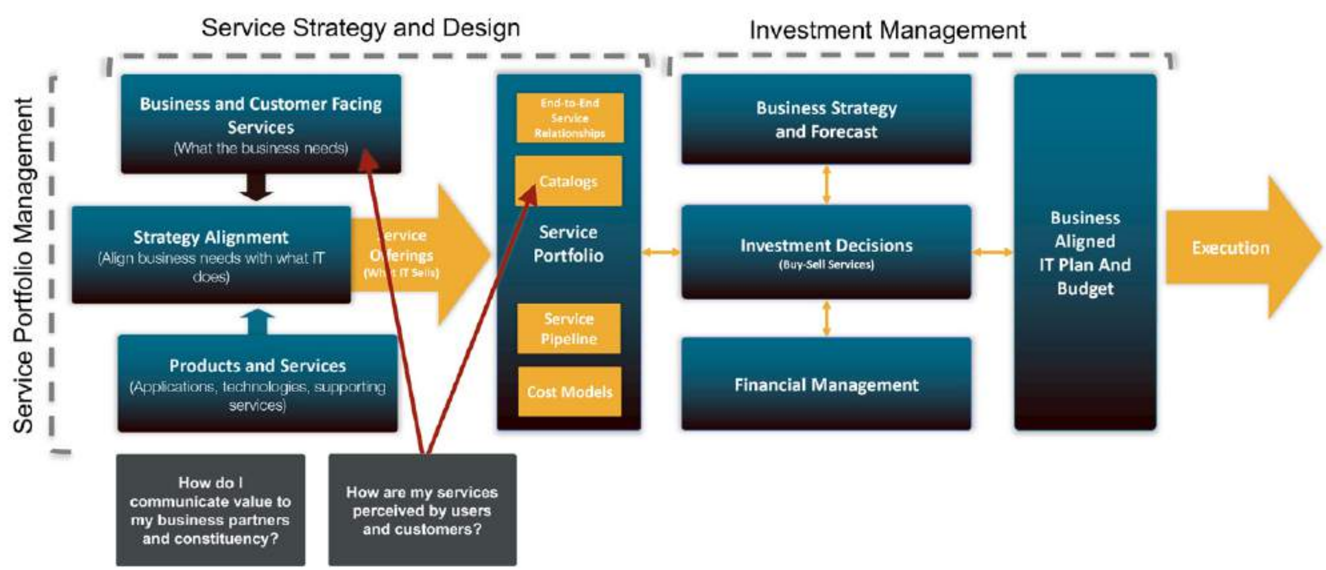
The customer expects to get a phone when they order one, that it works when they need it, get support when it doesn't work, get a new one when it's time to refresh, and get a bill that's reflective of what they bought and used. A lot of behind the scenes work and complexity is going on to make that happen—complexity the end-user and customer doesn't see nor care to see.

Your other IT services should look and function like this if you focus on what your customers need—services that are reliable and easy for them to use. This includes providing a bill that details costs related to the value received.

3 VALUE PERCEPTION

Understanding customer needs and building fully functioning service offerings is a key competency for organizations looking to run IT like a business and extend the value of the IT organization to their customers. This includes understanding and managing value perception of your customers. Let's take another look at the BOIT framework to illustrate this.

Figure 3:
Increasing Value Perception



Value perception is based largely on how well your services meet the needs of your customers. These service offerings are captured in a service portfolio where you can manage end-to-end complexity and provide easy to use catalogs and interfaces—the key to increasing value perception.

This includes building cost models that reflect service cost based on use and other value aspects. This is important because the cost of a service should reflect its value relative to those using it or buying it. These are evaluations we all make every day on a range of products and services – the key to the decision is how we perceive the relative value.

For example, a large bucket of storage cost in the IT budget does not reflect value and will be hard to defend when budget planning season comes around. You'll have to build an argument for that storage cost that will take time and it will likely meet resistance if your customers have IT cost perception issues. Instead, if you provide a cost for use of an "on-demand" storage service or a document management service that includes storage, you'll be much more likely to get buy-in because you're selling services that your customer uses and understands.

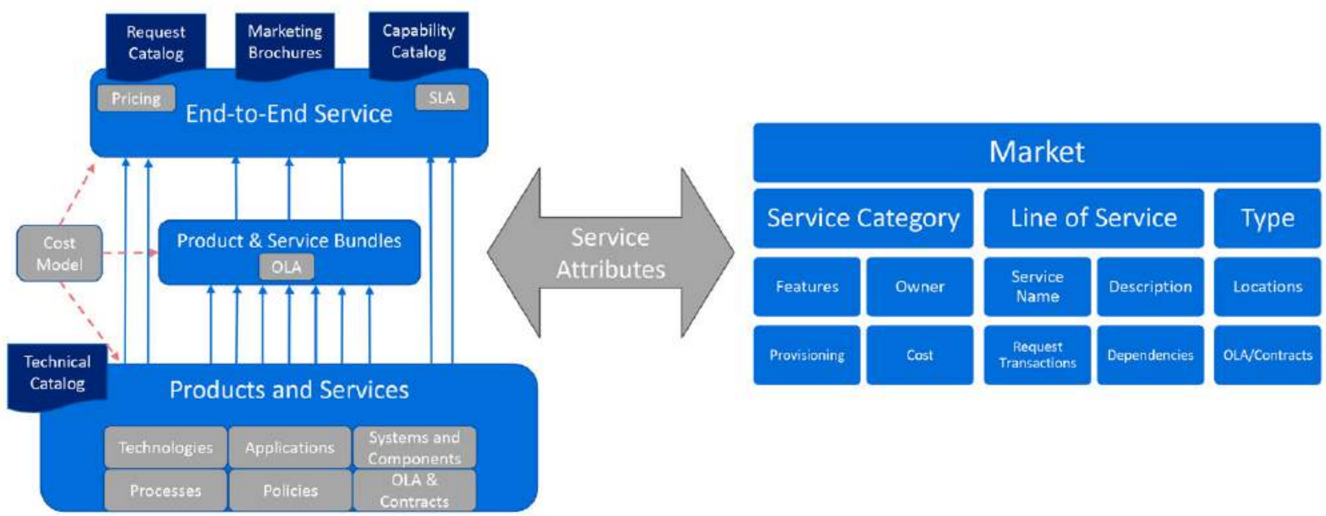
MANAGING SERVICE COMPLEXITY

How do you manage the complexity of services that span multiple functional teams, technologies and outside service providers? The answer is Service Portfolio Management.

The Service Portfolio, when properly enabled, provides organizational capabilities to assess, plan and make investment decisions on what services to offer in a manner that allows you to sell those services to your customers. Again, sell, because to run IT like a business, you need to change your game from focusing on what you do (managing and delivery IT) to what you sell: end-to-end services that your customers want to buy.

The service portfolio is where you manage the complexity between the disparate IT technology, functional teams and delivery mechanisms. It enables understanding and support for what is important to your customers and business partners. This is done by transforming what IT does into a set of deliverables tied together into end-to-end services that leverage a service taxonomy, service catalogs and service offerings that meet the needs of your business and constituency. Having a service portfolio provides the insight into making better decisions and is a key capability for any organization that intends to run IT like a business.

Figure 4: Managing Complexity with the Service Portfoio



PORTFOLIO INTERDEPENDENCIES

The service portfolio is also where critical interdependencies are established with other Business of IT processes and capabilities. A well-defined portfolio of services provides valuable information necessary to enable these processes and capabilities in a "service" context: For example:

- Financial Management for Services: Cost models, transparency, and budget planning in a service context.
- Application Portfolio Management: Application rationalization, standardization, life cycle and strategic planning linked to services and service value.
- Demand Management: Assessing, qualifying and shaping service demand to meet customer needs.
- Project Portfolio Management: Managing organizational priorities and projects aligned to service value.
- Configuration Management and CMDB: Linking underlying IT complexity to operational service impact models that can be used to support your service goals.

For organizations that want to move from "order takers" to strategic partners, enabling a service portfolio capability is crucial. The key outcome of developing a Service Portfolio capability is to re-orient your business model to focus on services and delivering service value. This will lead to better data that helps you make better business decisions and extends the value of your organization.

Cask has developed a Service Portfolio and Service Complete methodology to help organizations develop skills necessary to enable and manage fully functioning services and service portfolio.

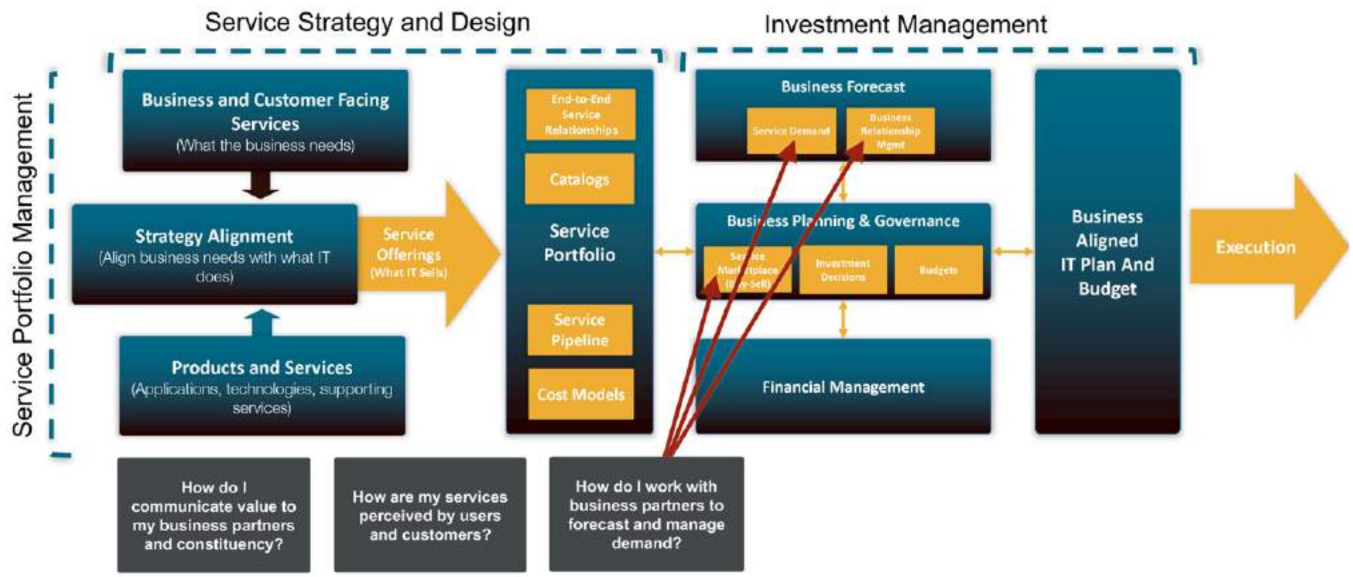
(create links and services)

4 WORKING WITH BUSINESS PARTNERS TO FORECAST AND MANAGE DEMAND

How do you work with business partners to forecast and manage demand? Are you engaging directly with your business partners? Do you they include you in discussions on their business plans?

We see many different challenges in this area. But, before we dig into these challenges, let's take a look at the BofIT framework illustration to put this in the context of the running IT like a business. Establishing a positive working relationship with your business partners is the key to success.

Figure 5:
Working with Business Partners to Forecast and Manage Demand



Managing demand starts with the business forecast. This includes understanding the needs of the business and translating that to IT demand. This is typically the responsibility of the Business Relationship Management function; the person or people that have regular interactions with the business or agency areas on behalf of IT and works to understand what the business needs. This person also provides valuable insight into planning and developing business focused services and solutions. Demand, once understood, is managed in a buy-sell arrangement based on the type of services. The secret sauce in this model is establishing business-focused services described in the previous chapters and setting up good demand governance.

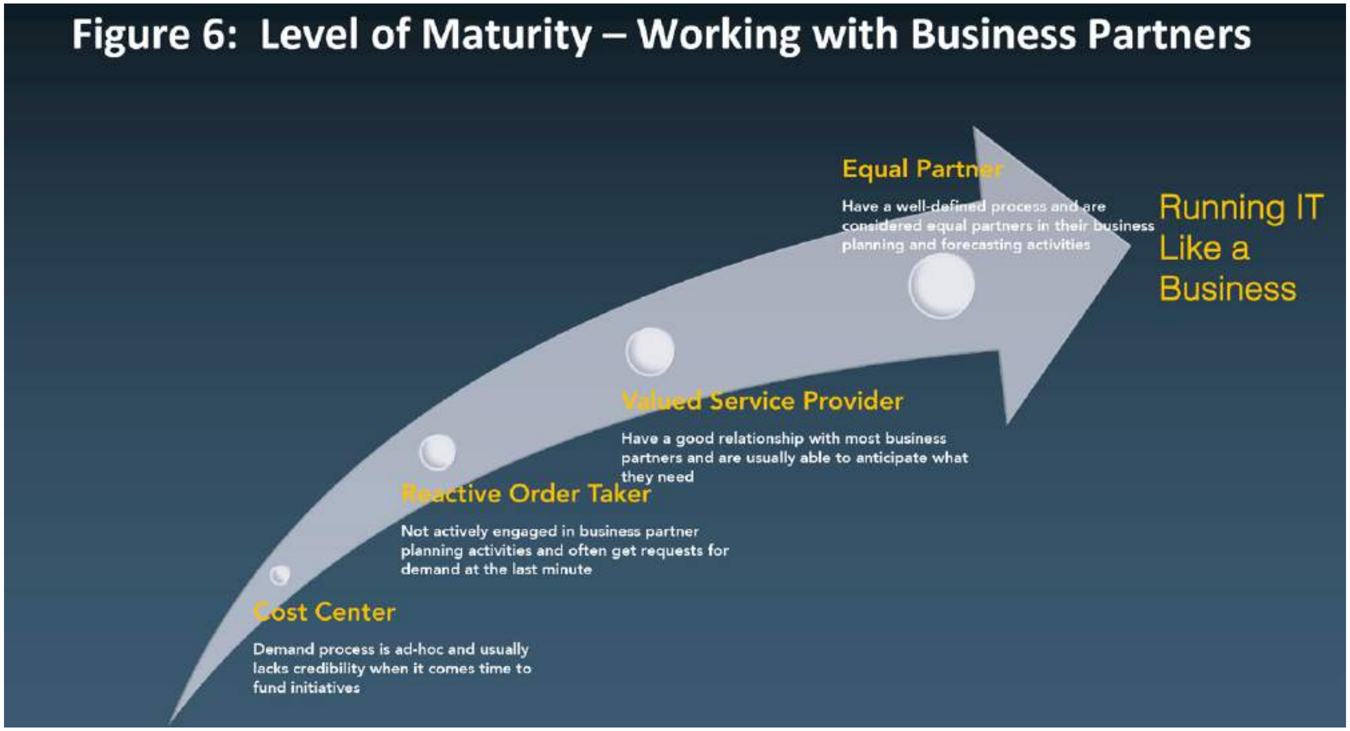


Figure 6: Level of Maturity – Working with Business Partners

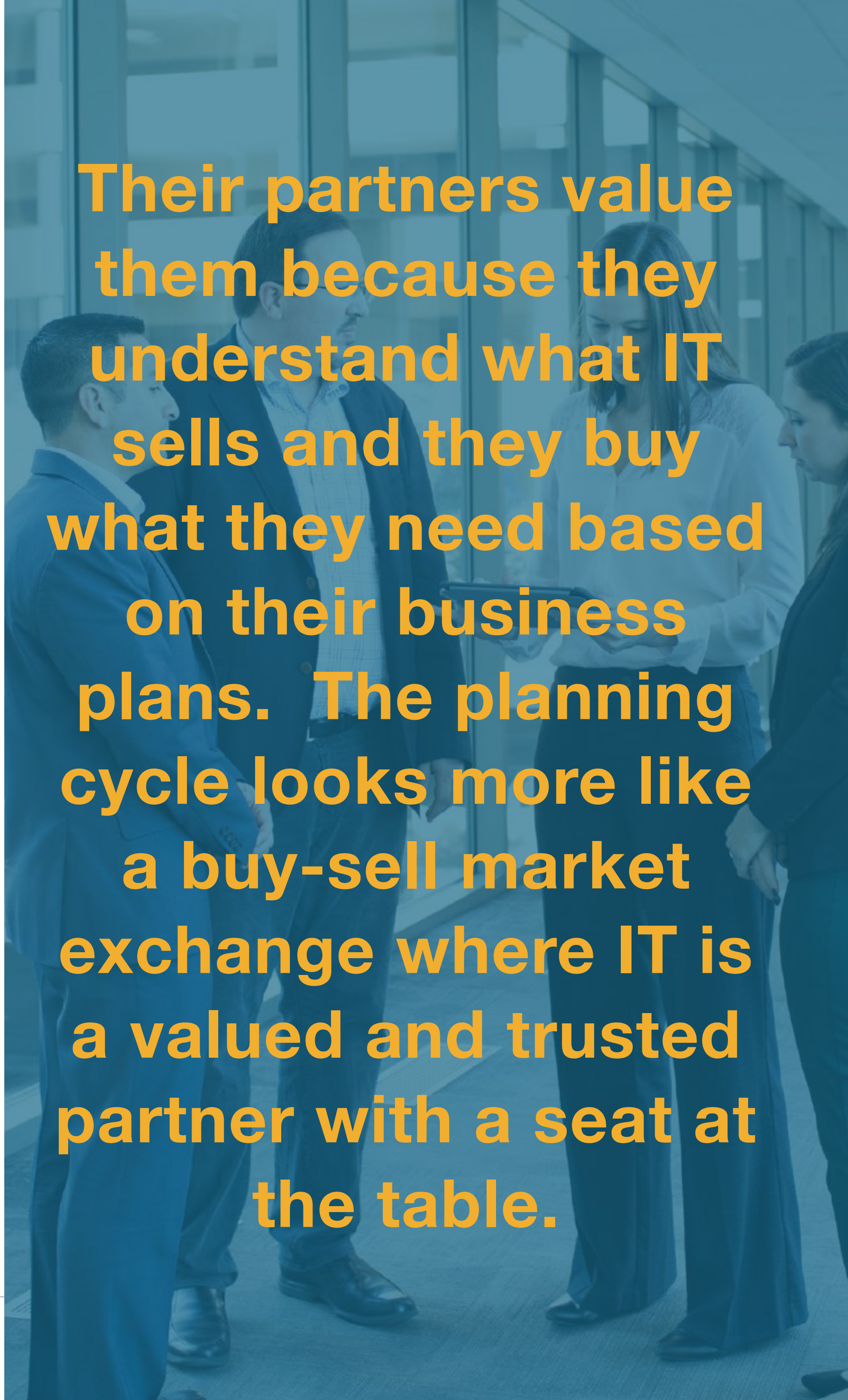
Let's take a closer look at this from a level of maturity perspective to get a better sense of these challenges.

Level 4: Equal Partner. Organizations at this level of maturity have a well-defined process and are considered equal partners in their business planning and forecasting activities. They typically have a formalized demand process with defined roles and responsibilities and work directly with their business partners through a business relationship manager role, have a service portfolio and manage services across the lifecycle. Projects have solid business cases with rigor appropriate to the size of the effort and include financial analysis.

Their partners value them because they understand what IT sells and they buy what they need based on their business plans. The planning cycle looks more like a buy-sell market exchange where IT is a valued and trusted partner with a seat at the table.

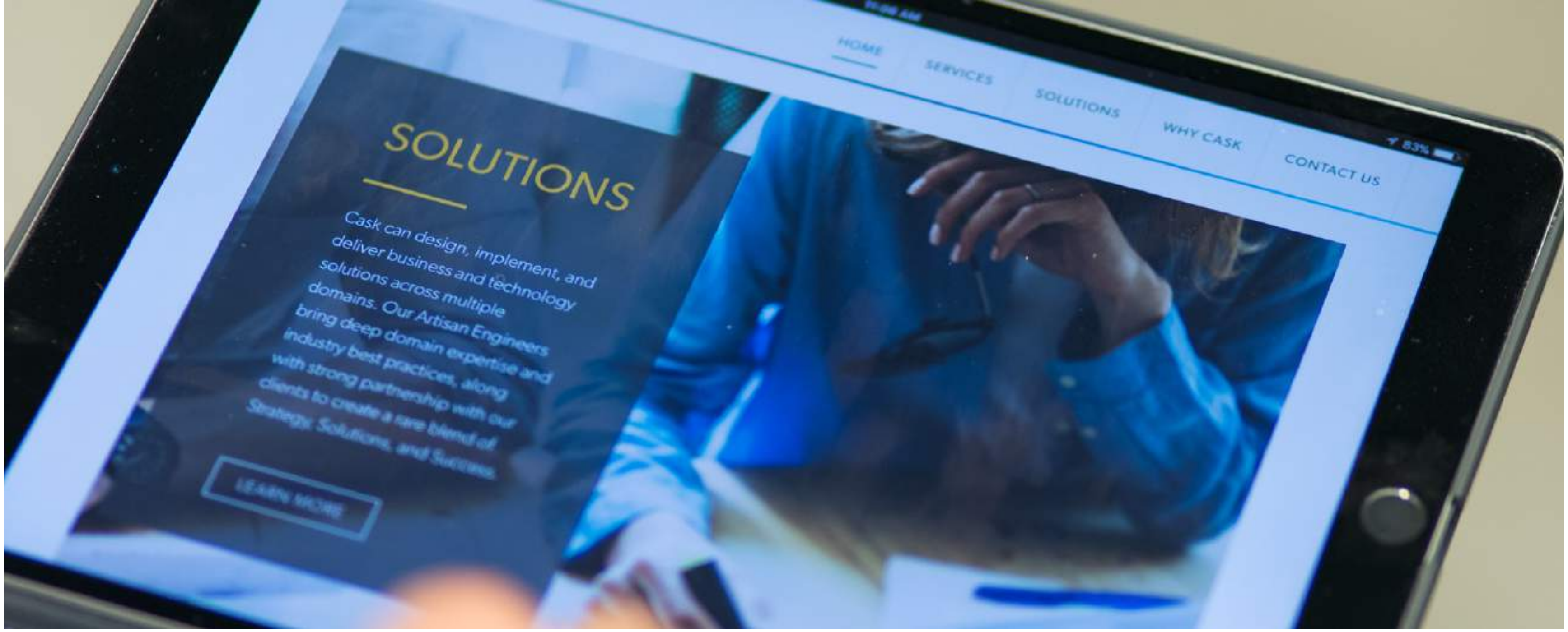
Level 3: Valued Service Provider. At this level of maturity, organizations will have a good relationship with most business partners and are usually able to anticipate what they need. The demand process is less formal and there may not be a defined business relationship manager role, but there is a mostly fact based business case. The positive IT/business relationship is usually due to interpersonal skills at the Sr. Leadership level and an intentional (action-based) desire to maintain those relationships. Services are defined and managed, but may not be fully enabled in an end-to-end manner. This can work reasonably well at smaller organizations, but will present challenges in larger and more complex environments.

Level 2: Reactive Order Taker. Here IT organizations are not actively engaged in business partner planning activities and often get requests for demand at the last



minute. This is a pretty strong indicator that there are disconnects between what IT is doing and what the rest of the organization is doing. Typically, demand is managed informally and manually in IT (largely ad hoc) with only occasional business level engagement. Big projects get funded on the strength of a sometimes sketchy business case or the influence of the business area, but understanding of business needs beyond that is hit or miss depending on the planning cycle. The services that IT provides to the business often lack definition.

Level 1: Cost Center. At this level, business partners consider IT a cost center and usually complain about the cost of IT. We see organizations at this level when they have lost the confidence of the business to deliver what it needs. The demand process is ad-hoc and usually lacks credibility when it comes time to fund initiatives. There is very little understanding of how IT delivers value and an oftentimes contentious relationship with the business. IT typically has an "inside-out" perspective, focused on technology and what they do instead of what they sell and how that impacts their customers.



If you find yourself in level 1 or 2, what can you do to get better connected with your customers? It starts by getting better engaged with your customers to begin understanding their needs. This can take the shape of a defined demand process along with better definition of what you provide in value terms (e.g., services you sell).

If you're closer to level 3 and struggle with the complexities of managing and evaluating multiple channels of demand across your organizational eco-system, you might benefit from automation and closer governance interactions with decisions makers.

If you're at level 4, you need to make sure your processes, services, automation tools and governance are tuned for the inevitable organizational changes.

Cask can help you establish better relationships with customers and business partners and mature your Demand Management and Relationship Management capabilities.

(Need links - and a plan to add these to our website)

5 UNLOCKING VALUE WITH SERVICE BASED FINANCIAL MANAGEMENT

Users of products and services struggle to understand value if they don't understand cost. IT organizations typically understand how much money is spent on infrastructure like networking equipment, servers and storage, but they struggle to relate this data to the services they provide to their customers.

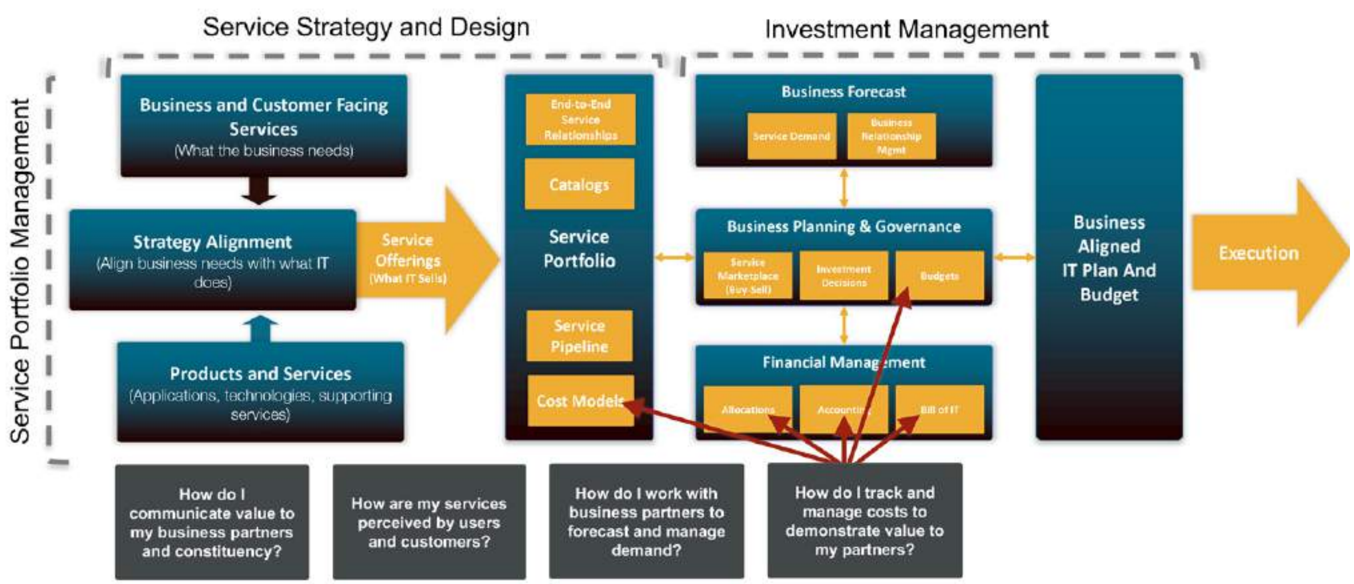
How can you track and manage costs to demonstrate value to your partners? It starts by relating costs to services using cost models and allocations that provide greater transparency to your customers. Having a well-defined set of services with defined costs helps you manage supply and demand while enabling an investment-based approach to managing your budget.

MAKING BETTER INVESTMENT DECISIONS

In the BofIT model, investment decisions are made based on the services you sell—no need to defend monolithic technology tower spend, arbitrary allocations or specific training, travel and compensation budgets. Customers make buy decisions based on service value (how much they need, what it costs, quality, etc.). You make spend decisions based on supply, demand and how you want to invest in your services.

The BofIT illustration details a business planning model that includes the service portfolio, business forecast and financial management. Most organizations have elements of this in place today. The shift for many organizations is enabling customer-aligned service offerings with cost models and pricing based on what you sell. This is used to enable an investment-based planning and budgeting mechanism focused on buying and selling services.

Figure 7:
Unlocking value with Service Based Financial Management



The good news is that, with a little tweaking, most organizations can accommodate an investment-based planning approach pretty quickly. You do not have to have complex chargebacks or cost models to enable effective investment decisions, business planning and budgeting. The goal is to understand cost drivers for your services, manage supply and demand and build a forward looking budget based on what your customers want to buy.

A reasonable level of transparency is also achieved in this approach, but it looks different than simply providing a bill of IT or a "show back" mechanism. While these can be useful for providing an "after the fact" perspective—showing what was spent last month or last quarter—they provide limited help in managing service investments. With a service portfolio-aligned business model, transparency now includes customer-centric services with a forward-looking plan and a budget that provides you the ability to manage technology products and services like a business.

Decoupling financial management from services (and the service portfolio) results in business people questioning the validity of the cost of IT. This ultimately leads to perception problems and budget decisions that are disconnected from the realities of the work being performed by IT. The more believable your cost model, the better your relationship with business will be.

UNLOCKING VALUE WITH SERVICE COST MODELS AND ALLOCATIONS

Unlocking the value of IT includes building cost models and allocations that reflect the services you provide. When you do this, your customers will start thinking in terms of the support you can offer their business.

Here are some guidelines that will help your organization unlock service value.

1. Start Simple. Keeping your services simple and easy to understand for your customers will also make it easier to construct a cost model. It is okay to begin with services at a broader level such as Network Connectivity, Desktop Services, Storage, Application Hosting, and Security. As long as your customers can understand their value, there is no one right way to set up your services.

The more believable your cost model, the better your relationship with business will be.

2. Build Iteratively. Once you get started and get comfortable with a service-based approach, you can progressively add more context to your cost model. Cost models and allocations can get overly complex, so moving from GL accounts and cost pools to functional costs is both an easy early step and a quick win to show cost transparency. As you move up from there, categories of service cost can be exposed. Here, you can begin to create the bundles of products and services that can be translated into customer-facing and business services.

3. One Time vs. Recurring Costs. Many one-time costs can be identified, documented and passed on directly to the customer requesting it. You can also track project costs and begin to understand projects in

a service context by asking what service is being introduced or changed in regards to this project. Whether the project is to improve security, enhance an application or add more storage, these project costs should be related to the services they support and managed as service investments.

Non-Project costs can be approached by looking at recurring costs. These costs are sometimes labeled "Run the Business" costs. Look to understand the main drivers of recurring costs such as maintenance, licensing, and connectivity charges. Then, focus on managing these costs in a logical grouping of services.

4. Allocation Mechanisms. There are many ways to allocate costs. The key is to understand how your indirect cost should be allocated to the services you support. Again, you can start simple by building a functional model and expand to services as your organization matures. Your allocations do not need to be 100% accurate, but they do need to be fair and defendable. Start looking at the portion of the recurring costs that are indirect. Most direct costs can be captured and charged to a specific customer—including

one-time project costs. Engage your finance department to see how they look at and allocate these items. They may surprise you and give added credibility to your model.

Having service costs will greatly change the dialogue with your customers and business partners and naturally shows the value you are providing. Your customers will be pleased to engage in discussions that are focused on services and investments that translate directly to the needs of their business. They will defend those investments because they understand the value proposition. You get to run your organization like a business—making budgeting decisions based on selling your services.

Cask can help you identify your services and establish business planning and governance based on a service strategy with an investment-based capability that you can use to clearly demonstrate value to your customers.

(Create links and services on our website).

6 PRIORITIZING PROJECTS

Managing multiple demand channels, competing priorities and supply side resources is a challenge for most organizations. Yet, understanding these is crucial in making good investment decisions. In the figure below, we can see the key activities and elements necessary to move different types of demand through a qualification and funding stage to a Project or Enhancement.

Figure 8: Demand to Project Initiation

How do you prioritize projects in the context of organizational constraints? Let's look at four areas of considerations for effective project prioritization:

1. Understand Your Demand. Prioritization starts with assessing and qualifying demand. This includes business case development, technical & architectural assessments and rough order of magnitude estimates. Understanding risks, value, costs and size are all important early in the demand process. But be careful—demand can get bogged down with too much information. The primary goal of the demand process is to get enough information to make good decisions to "qualify" demand for further funding assessment. Too much time spent on demand earlier on makes the whole process slow and over-burdened. Tune your process to capture the essential information necessary to move to the next stage.

2. Understanding Your Resources Availability. Understanding your organizational and IT capacity is also necessary to make good prioritization decisions. All your demand governance will be rendered ineffective without a proper understanding of the supply side.

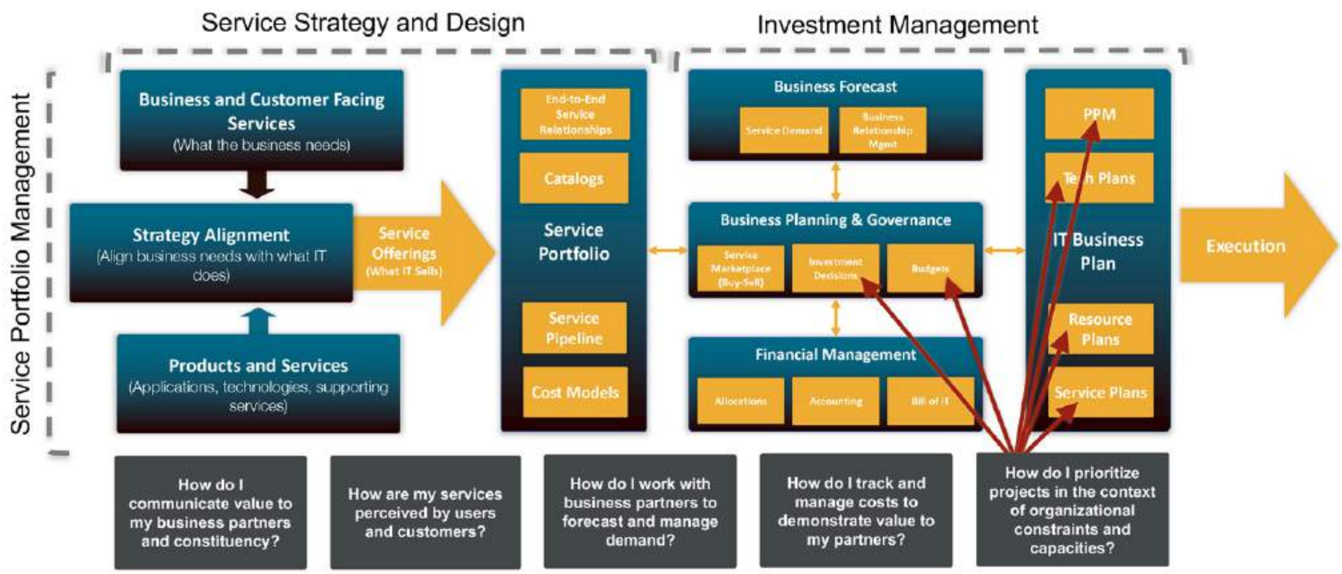
Good investment governance leans heavily on the demand process and includes both strategic and run-the-business efforts.

The demand and project planning process should include an assessment of organizational aspects including how much change can be absorbed in a given time frame, what resources are needed, when they are available and any critical path constraints.

3. Strategic Alignment to the Enterprise. There needs to be a clear understanding of how IT supports and enables business objectives. This means that the services IT is delivering have clear value connectors to the rest of the organization. Investment prioritization includes understanding how your services impact your customers and your business partners' ability to meet their goals. Absent service value, funding IT projects too often ends up being based on technical value or is skewed by organizational bias. In those scenarios, the big revenue departments tend to get funding while everyone else fights for the remaining investment dollars. These types of projects can result in limited organizational value because the investment decision-making is flawed.

4. Strong governance. Good investment governance leans heavily on the demand process and includes both strategic and run-the-business efforts. Many IT organizations focus on one or the other—or have two separate mechanisms—but both need to work together to get an accurate picture of work in flight and work being planned. Strong governance includes the ability to incorporate proactive business participation and linkage to key suppliers of services across the IT landscape. When built properly, your governance

Figure 9:
Prioritizing Projects



should include the ability to manage the intersections of process, service and technology. These all need to be aligned to make good prioritization decisions.

Cask can help you prioritize your projects. We partner with ServiceNow to build end-to-end solutions that will help you understand demand and project priorities across your business constituency so you can make investment decisions based on what's important to the success of the organization.

(Links to Demand, PPM, Governance and Planning services)

7 RUNNING IT LIKE A BUSINESS WITH SERVICENOW

We've now covered the key elements of the Business of IT framework and have a good understanding of the capabilities necessary to run IT like a business. The missing piece in this discussion is deciding what tools are needed to support the disparate activities that span organizational boundaries to provide business of IT capabilities. Most organizations have point solution tools in place, which are difficult to manage and provide limited value for organizations looking to increase efficiencies and reduce operational costs. Furthermore, we still see a lot of teams working in spreadsheets and using e-mail to manage tasks and to collaborate across a variety functions.

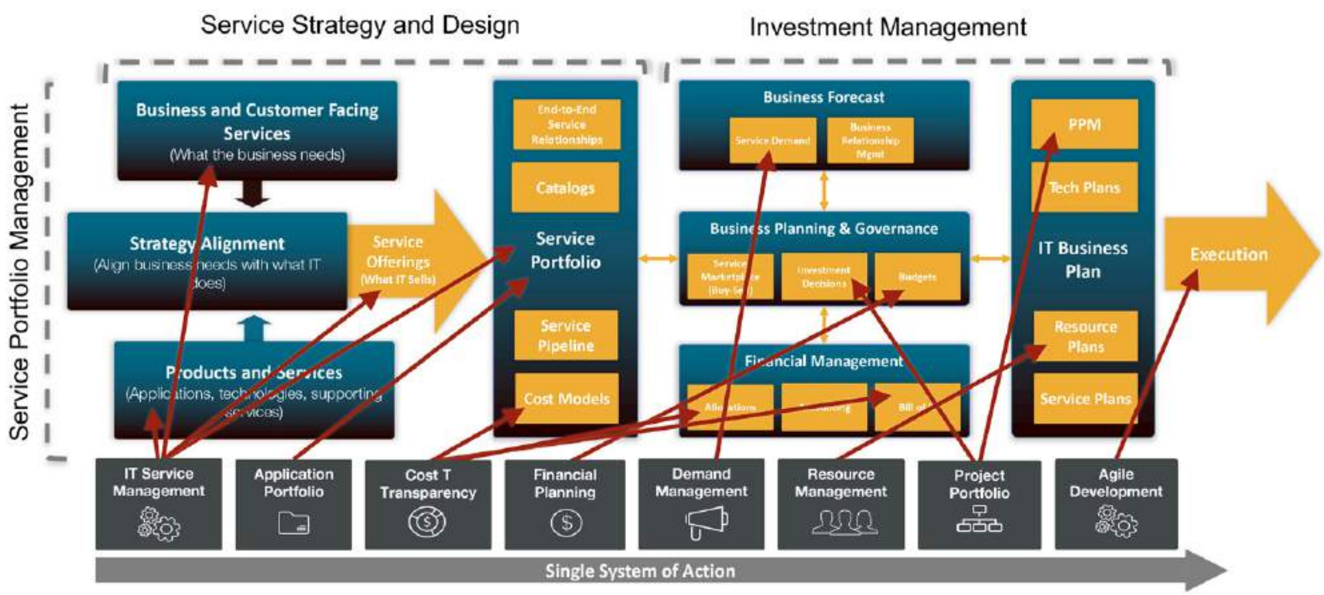
What's needed is a single system of action with a user-friendly interface where teams can collaborate and manage their work across multiple capabilities and organizational functions. As many of you know, ServiceNow is a leader in the IT Service Management (ITSM) and IT Business Management (ITBM) space. They offer a variety of solutions that help organizations run IT like a business. Their platform provides a single system of action where teams can get their work done more efficiently while providing much better information and transparency so you can make better decisions.

What's needed is a single system of action with a user-friendly interface where teams can collaborate and manage their work across multiple capabilities and organizational functions.

So how does the ServiceNow solution align to the Business of IT framework? Let's walk through ServiceNow's ITBM solution set and see how it can help you manage the key aspects of the BofIT capabilities we have been discussing.

Figure 10:

Cask BoIT Framework - ServiceNow ITBM Connectors



In figure 10, we see a visual of the BofIT framework with value connectors from ServiceNow's ITBM solutions to the BofIT capabilities. Let's take a closer look at how ServiceNow's capabilities (from left to right) can help you run IT like a business.

- IT Service Management: ServiceNow's roots are in service management. Here you can leverage a very mature set of capabilities to build out your service offerings and transform what you do into what you sell. They offer service portfolio, CMDB, catalog, portal and self-service capabilities that can be leveraged to up your "services" game and extend the value of your organization. This includes considering the user experience as this is where you have the most direct interaction with your customers.

- Application Portfolio Management: Applications are complex, with many dimensions of function and information that need to be managed. ServiceNow can help you manage application complexity by enabling a portfolio capability that can be related to business services including your service portfolio. You can manage the application portfolio to understand business, application and technology perspectives to help you rationalize capabilities and costs across the lifecycle of your service investments.

- Cost Transparency: ServiceNow's Financial Management capability includes cost transparency. This is a great place to start tracking and managing costs in the context of the services you provide. Upload your GL and cost center data and leverage the workbench to allocate and manage your IT costs. As you expand ServiceNow's footprint across the enterprise, you get the added benefit of being able to leverage information you need to build more effective cost models that lead to defendable allocations and budgets.

- Financial Planning: Optimize your budget planning process and increase collaboration - reducing the fog of disparate spreadsheets and tools. This capability comes tightly integrated with Project and Portfolio Management that will help make budget planning activities more efficient by leveraging an online repository of relevant planning information.

- Demand Management: Track your demand from idea to project in one place across your entire enterprise. Leverage in-tool automation and collaboration for approvals, assessments, business case development and governance to streamline demand qualification. Manage demand across the lifecycle with dashboards and reports. Extend this capability to your business partners to get them engaged in telling you what they need, which will also serve to incorporate their business plans with yours.

- Resource Management: Create plans, request staffing for projects and assign resources to specific tasks. Get a consolidated view of staff availability, allocation and capacities for all work tracked in any ServiceNow application—including projects, incidents, problems, changes and custom applications built on the Now Platform™.

- Project Portfolio: Create and manage a wide range of projects—from a few small tasks to large portfolios containing complex activities with various relationships and dependencies. Organize development tasks into projects, and projects into programs and portfolios. Then collaborate, report, and track your project planning with more information for better business decision-making.

- Agile Development: Agile Development manages Scrum or waterfall development while overseeing the backlog of tasks throughout the lifecycle—from inception through testing and deployment. Gain increased visibility into the entire software development lifecycle.

There is tremendous value in having a single platform to manage tasks, integrate point solutions, and automate workflow across the complexity of business management functions and simultaneously capture business-critical information using a single system of action. IT teams can collaborate, manage their work and share information seamlessly across the enterprise. Your customers and business partners can more effectively participate in value-added collaboration with IT, and will have access to the information they need to support their businesses. You will be able to make better decisions because you will have better data to understand and anticipate what your customers need.

Cask is a Gold partner with ServiceNow and provides a full set of advisory and implementation services that will help you get the best value from your ServiceNow

8 GETTING ON THE RIGHT PATH

We've covered a lot ground, so now the big question is: how do we build a workable strategy to run IT like a business? If yours is like most organizations, you've got organizational structure and processes that need to be addressed, you've got tools and interfaces that need to be considered, and you likely have important data in numerous repositories. Taken all together, this can be complex. So where do you start? The good news is that all IT organizations are engaged in some level of performing the BofIT capabilities we have been discussing. What's needed is a guided and informed strategy to address the challenges of their unique situation and environment.

The four-step approach we use at Cask can help:

1. Discovery: The first step is to get a clear understanding of where you are relative to the capabilities under consideration. Here there are five areas to focus on:

a. Process Capabilities: Assess your current-state capabilities to understand the level of maturity in each process area. This includes looking at existing workflows, roles, responsibilities and policies. Look at how cross-functional activities and hand-offs are managed. This will give you a sense of your capabil-

ities' level of efficiency and effectiveness. Are there a lot of manual steps in the process? Are there multiple tools that have to be managed? Perhaps there are too many approval levels or not enough—the assessment will bring this to light.

b. Organizational Structure: In conjunction with the process assessment, you'll start to see how well your organizational structure aligns to the execution of those processes. Look for overlaps, where teams may have misguided responsibilities—or don't understand their responsibilities in the first place. These will become apparent as you work your way through the process activities.

c. Tools and Automation. Here is where you look at the tools (or lack of tools) used to support the process capabilities. In most situations, there are multiple tools in use that create inefficiencies. You will also uncover manual processes (managing tasks and approvals by e-mail is a big one). Seek to understand how the tools are used, who uses them and how effective they are.

d. Data Analysis: In conjunction with the technical assessment, capture what data is needed to support the process capabilities and where that data resides. Determine where the source of truth is as data often gets replicated across the enterprise.

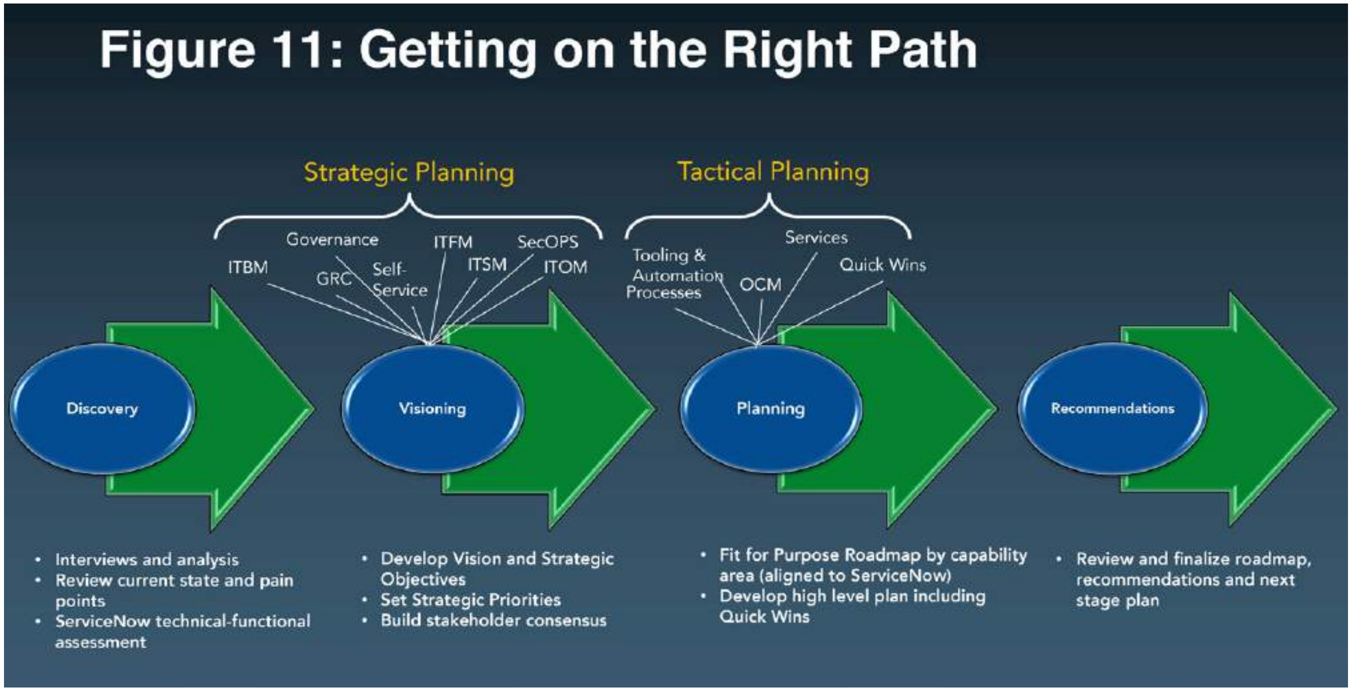
e. Pain points and competing priorities: What is keeping you up at night and how is this impacting

IT's ability to deliver on the promises made to your business partners.

2. Visioning and Strategic Planning: Armed with a good understanding of the current state, it's time to get clarity on the organizational vision as it relates to the business of IT. This is something that has to be worked out at the Sr. leadership level. Most organizations have a sense of where they want to go, so this is more about getting agreement on that vision and creating strategic objectives based on the priorities and pain points of the organization. This is also a good time to engage in your business partners and customers—stakeholders in your success—and to use this as an opportunity to build the bridges needed for the strategy which leads to that success.

3. Tactical Planning: Once there is clarity on the vision and strategic objectives, you can put together a plan to execute the strategy. This is where it all comes together (and it can get a little a tricky). For your plan to be effective, you'll need to correlate the intersecting elements of tools, process, service and organizational priorities within a roadmap and execution plan that will get you where you want to go. It will be important to understand the proper sequencing of the capabilities to make sure the foundational elements are well thought out—you don't want box yourself in.

4. Recommendations and Funding: Now you have a plan, the plan is aligned to the strategy, and the strategy has the support of your business partners. It's time to finalize the recommendations and acquire the funding to get started on your way. Large projects can get bogged down, so try to take on bite-sized pieces to keep the momentum going. There are usually some quick wins to leverage as you get stated.



At Cask we have experts that can guide you through these steps while providing a strategy that will get you on the right path. We take pride in helping organizations solve problems. We focus on enabling capabilities and taking a holistic approach that goes beyond implementing technology.

CASK PLUS SERVICENOW DIFFERENTIATION

Reputation as an Unbiased Advisor

- Our advisors have been down this road as practitioners and understand your perspective and how to leverage ServiceNow to get the best value.

Low Cost Entryways to Extend BofIT/ITBM Value

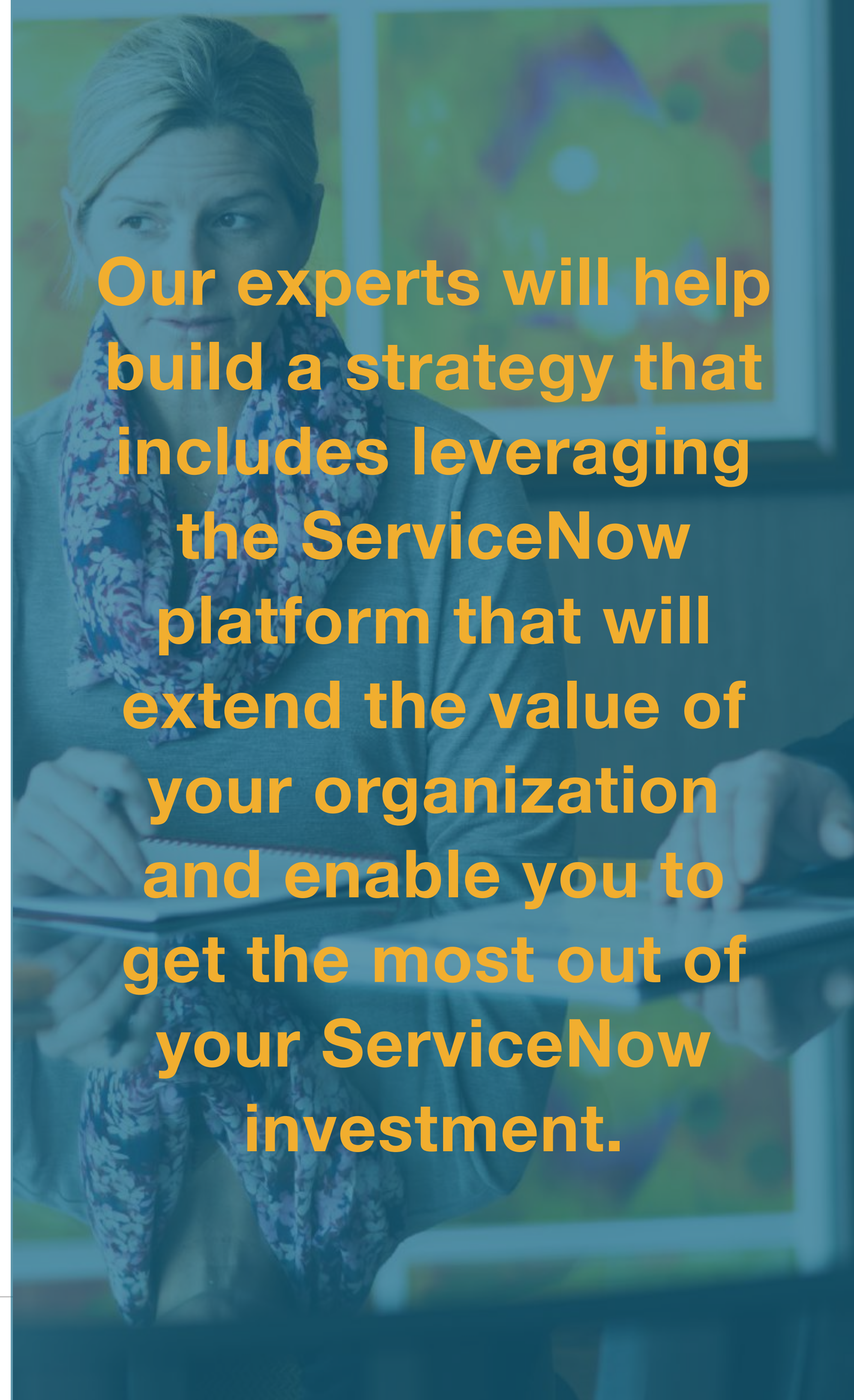
- Cask brings industry recognized transformation expertise that can be purchased in “bite sized” pieces based on specific pain points instead of large scale engagements

Low Risk and High Value Engagement Model

- BofIT roadmap service provide a quick start on transformation initiatives that provide in-depth discovery and assessment activities.
- Reduced risk of failed initiative by leveraging design and requirements work sessions to provide more accurate implementation and enablement plans.
- Value checkpoints to ensure you are getting the outcomes you want

Cask is ServiceNow’s #1 Transformation Partner

- Cask provides integrated solutions and exceptional user experiences to help you modernize your business.



Contact us for a free consultation.

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