

Information Technology Council

July 27, 2010

Welcome



Teri Takai

Agenda

- Introduction – OCIO Chief Deputy
- Peter DeLisi, Santa Clara University
 - “Why CIOs are Last Among Equals”

OCIO Chief Deputy



Mike Locatis



Statewide E-mail Consolidation 5 Phase Approach

**Michael Locatis,
Deputy Chief Information Officer
ITC Presentation
July 27, 2010**

**INFRASTRUCTURE
CONSOLIDATION PROGRAM**
EFFICIENCY ▲ COLLABORATION ▲ SUSTAINABILITY

Executive Order S-03-10



Office of the Governor

ARNOLD SCHWARZENEGGER
THE PEOPLE'S GOVERNOR

EXECUTIVE ORDER S-03-10

02/09/2010

WHEREAS the national recession, falling tax revenues and serious budget shortfalls require that the State reduce spending and achieve greater efficiencies in all areas of government; and

WHEREAS state government must achieve every possible efficiency in its operations and in its delivery of services to Californians; and

WHEREAS state government spends more than \$3 billion annually on information technology and telecommunications; and

WHEREAS the operation of information technology and telecommunications equipment accounts for two percent of global greenhouse gas emissions and that figure will increase to four percent by 2020 without concerted action; and

WHEREAS information technology equipment accounts for 40 percent of energy used within office environments; and

WHEREAS the Office of the State Chief Information Officer (OCIO) was created in statute to minimize overlap, redundancy, and cost in state operations by promoting the efficient and effective use of information technology and telecommunications; and

WHEREAS the Governor's Information Technology Reorganization Plan integrated statewide information technology functions, including the Department of Technology Services, the Office of Information Security, and the Department of General Services' Telecommunications Division, within the OCIO; and

WHEREAS the State of California is fully committed to leveraging a common technology platform and shared services in order to make state government more transparent, accessible and accountable, enhance the quality of services to residents and businesses, ensure the security and reliability of the state's information systems, protect the privacy of information and data, promote emerging technologies, and develop enterprise applications with standard interfaces; and

WHEREAS state agencies and departments under my direct executive authority must be accountable for reducing the fiscal and environmental impacts of information technology and telecommunications goods and services; and

WHEREAS leveraging shared services and consolidating information technology and telecommunications equipment, resources and investments have been proven to achieve greater efficiency, cost-effectiveness and environmental sustainability in information technology and telecommunications operations.

NOW, THEREFORE, I, ARNOLD SCHWARZENEGGER, Governor of the State of California, by virtue of the power and authority vested in me by the Constitution and statutes of the State of California, do hereby issue this Order to become effective immediately:

1. The State Chief Information Officer (State CIO) and the Office of the State CIO (OCIO), consistent with Government Code section 11545 et seq., shall have authority as provided by law over all information technology (IT) infrastructure and shared services, including, but not limited to, the following: data and telecommunications

13. The CIOs of all agencies under my direct executive authority shall transition to the state's shared e-mail security and encryption solution by no later June 2010, and shall work with the OCIO to migrate to the state's shared e-mail solution by no later than June 2011.

Phase 1 – Preparation

Completion Date: August 15, 2010

- ▶ Identify Governance Structure for each Agency
 - ▶ Agency Project Manager
 - ▶ Business Stakeholders
 - ▶ PIO
 - ▶ Technical Staff (E-Mail, Directory, Network)
- ▶ Identify Department Level E-Mail Migration Project Team
 - ▶ Project Manager
 - ▶ Business Stakeholders
 - ▶ Technical Staff (E-Mail, Directory, Network)

AIOs have overall responsibility for their departments planning and implementation

Phase 2 – Assessment

Completion Date: October 31, 2010

- ▶ Resource Planning
- ▶ Business Processes
- ▶ Network Capacity
 - ▶ CGEN planning needs to consider e-mail
- ▶ Decide Migration Strategy – CA.Mail or Hosted Email Solution
 - ▶ Forums will be held in August and September to present features and functions of each solution

Phase 3 – Planning

Completion Date: January 31, 2011

- ▶ Project Management Plan
 - ▶ Templates available from E-Mail Consolidation Workgroup
- ▶ Business Decisions
 - ▶ Determine Pilot Group
 - ▶ Migration Groups and Velocity
 - ▶ Migration vs. Clean Cutover
 - ▶ E-Mail Retention Policy (impacts storage requirements)
- ▶ Statewide Migration Schedule
 - ▶ Identify First Wave for Hosted Solution
 - ▶ Statewide Schedule will be developed in November

Phase 4 – Migration

Completion Date: June 30, 2011

- ▶ Implement Statewide Directory Standards
- ▶ E-Mail Migrations
 - ▶ First wave planning with hosted solution vendor begins in August
- ▶ Training
 - ▶ End Users
 - ▶ Administrators
 - ▶ Service Desk

Phase 5 – Completion

Completion Date: June 30, 2011

- ▶ All Executive Branch Departments migrated to CA.Mail or the Hosted Email Solution

E-Mail Consolidation Workgroup

- ▶ Workgroup evolution
 - ▶ Subgroups for planning and implementation
 - ▶ Document sharing (project and migration plans, e-mail retention policies)
- ▶ Planning forums to be scheduled
- ▶ Setting Statewide Standards
- ▶ Migration Group Size
 - ▶ Large Departments
 - ▶ Medium Departments
 - ▶ Small Departments
 - ▶ Platform Specific

Questions?

AskCIO@cio.ca.gov

Santa Clara University



Peter S. DeLisi

Lessons from an Information Technology Leadership Laboratory

Presented by:

Peter S. DeLisi

Santa Clara University



Agenda

- Introduction
- Methodology
- Findings
- What Can You Do?
- Your Feedback to Us

Introduction

- Beginning State:
 - CIOs not seen as peers by the other senior executives
 - Less than half report to the CEO
 - Few CIOs become CEO
- Purpose of Our Study
- Earlier CEO Study

Being a Successful CEO

- General manager
- Strategic sense
- People skills
- Communication
- Leadership

Being a Successful IT Executive

- Strong enough technically
- General management skills
- Strategic skills
- People skills
- Communications skills

Information Technology Leadership Program

- Leadership
- Being Strategic
- Executive Thinking
- Leading Technological Change
- Consulting Skills
- Relationship Building
- Sales and Influence Skills
- Thinking Styles

Why Does It Matter?

- Advance Your Career (*and the career of your successor*)
- Better Develop Your Own people
- Be a More Effective CIO
- Contribute More Value to the Organization
- Enhance the Profession



Our Purpose Today

To have you join me in building this profession into one that will continue to grow in value and be one that we can all be proud of.

Methodology

- Observed over 600 students over a 12 year period.
- Most were Director level, but at least 30 CIOs
- Observations were collaborative
- Main observations based upon a unique three-part role play/case study

Findings

CEO Comment on IT Leadership

“A lot of CIOs haven’t let go of the technical specialty of being an IS guy, as opposed to leaving that and becoming a corporate executive.”

Observations About Leadership

- Leadership is necessary but not sufficient for being a senior executive.
- Leaders are influential, communicate well, relate strongly with others, etc.
- Ample opportunities to stand out as leaders in the case study

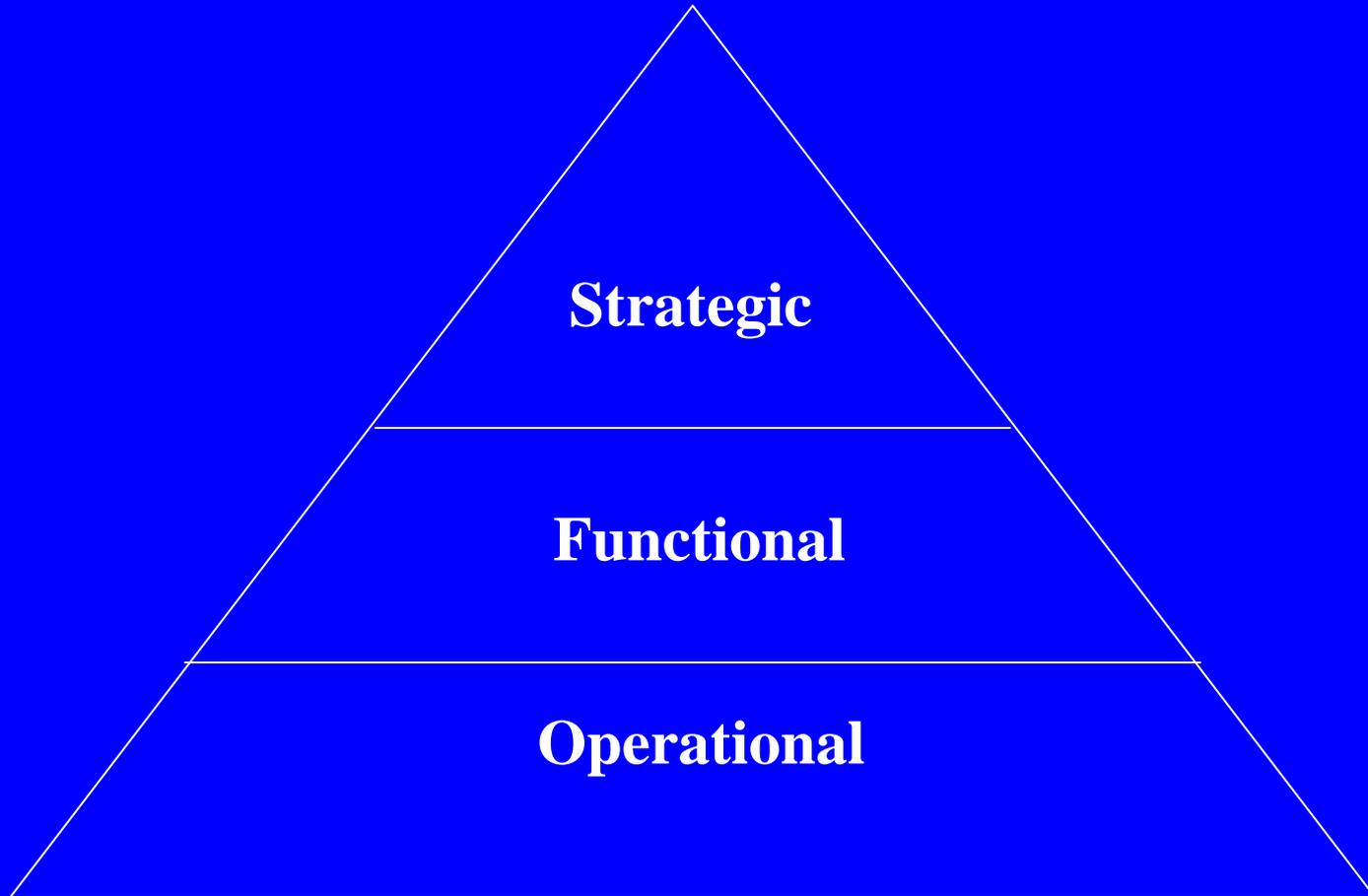
Strategic Thinking

- Research on Senior Executives

The Executive Perspective

- External
- Strategic
- Developmental
- Administrative
- Averse to Win-lose Propositions

Robert Anthony Pyramid



Strategic Thinking

- Research on Senior Executives
- **Strategic Content is New**
 - **The Strategy Process**
 - **Vernacular**
 - **Tools**
 - **Leading Thinkers and Their Thought**
 - **Challenges of Strategy Execution**

Synthesis

- “Ability to form parts into a whole”
- A very important executive trait

How CIOs Measure Up (On Strategy/Synthesis)

"I see the traditional MIS person getting lost in the forest of the technical stuff ...when they synthesize, it's a synthesis of systems and not of the business, which is very different."

Synthesis

- An important executive trait (“formation of parts into a whole”)
- **Ability to synthesize case study data into a pattern**
- **Only one team in 12 years has successfully solved the case.**

"Considering that I traveled all the way from Tokyo, how much did I miss by?"

JAL Pilot

“It is impossible for the drivers to keep their timetables if they must stop for passengers.”

Company Bus Official
Rural England

What's Lacking?

“He is the worst communicator of the senior level management...he's light years ahead of the guy he replaced.”

Communication Skills

- Reasonable on the surface, but poor in the areas of:
 - Presentation Skills
 - Questioning Skills
 - Listening Skills
 - Closing Skills
 - Handling Objections

Influence Skills

- Little or no knowledge and skill in the following areas:
 - Thinking Styles
 - Sales Skills
 - Marketing
 - Generic Influence Skills
 - Role of Education
 - Role of Macro Influences of Strategy and Culture

Relationship Skills

- Generally good skills and positive attitudes
- View of CEOs and business leaders

“Ask CIOs if they have solid relationships with business leaders, and they likely say, ‘Yes.’ Ask business leaders about their CIOs, and you’ll likely hear a different story. And this disconnect has only increased.”

Bill George
Former CEO Medco

Relationship Skills

- Generally good skills and positive attitudes
- View of CEOs and business leaders
- **It's the knowledge of little things**
- **Need more face-to-face time**
- **Other skills will help**

“For example, in the interview itself, my method of asking questions and the content of what I ask project a certain image of me. If I want to establish a collaborative, helping relationship with the person being interviewed, I must behave in a manner congruent with such a relationship.”

Ed Schein

Relationship Skills

- Generally good skills and positive attitudes
- View of CEOs and business leaders
- It's the knowledge of little things
- Need more face-to-face time
- Other skills will help
- **Future research areas:**
 - **Enhancing client self-esteem**
 - **The “right” client-centered attitude**

Maintaining and Enhancing Self-Esteem

- Treat customers as individuals
- Make the environment knowable and predictable, so people feel in control
- Create a customer-friendly environment in which people feel smart, competent, important and comfortable
- Offer them choices

The Teacher's Attitude

“I understand your anxiety and discomfort about this technology, but I will be there for you. I care for you and I care for your success. I will do everything within my power to alleviate your concerns and to help you be successful.”

What Can You Do?

- Become Strategic
 - Ask the right strategic questions
 - Focus on goals
 - Read the right stuff and circulate it
 - Use some strategic tools

Getting at the Strategic Purpose of the Business

1. What is the mission of your group?
2. How do you define success?
3. How are you measured?
4. What are the goals of your group?
5. What are your critical success factors?
6. What is the contribution of your group to corporate success? Your value-added?

Strategies for Leadership

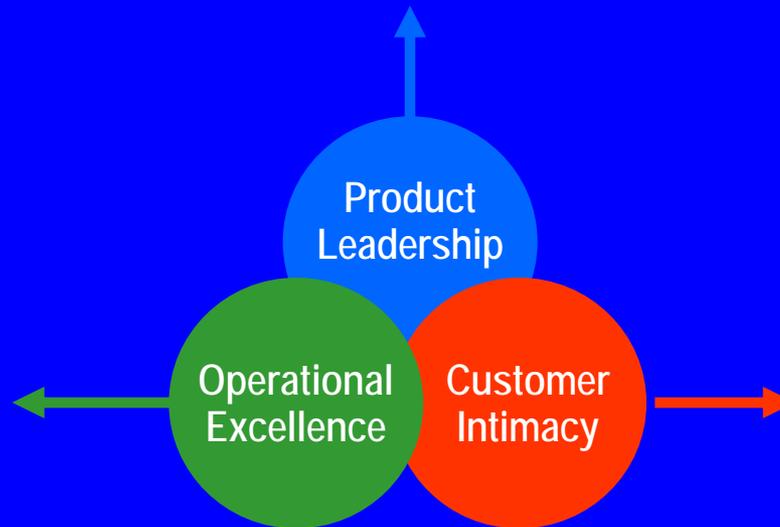
(Source: Treacy and Wiersema)

Customers' Perspectives:

- “They’re the most innovative”
- “Constantly renewing and creative”
- “Always on the leading edge”

Customers' Perspectives:

- “A great deal”
 - Excellent/attractive price
 - Minimal acquisition cost and hassle
 - Lowest overall cost of ownership
- “A no-hassle firm”
 - Convenience
 - Reliable product and service
- “They never make mistakes”



Customers' Perspectives:

- “Exactly what I need”
 - Customized products
 - Personalized communications
 - Available through preferred channels
- “They’re very responsive”
 - Exception handling
 - Locally understanding rival’s moves
- “I’m very loyal to them”
 - Inducing, building relationships

What Can You Do?

- Become Strategic
 - Ask the right questions
 - Focus on goals
 - Read the right stuff and circulate it
 - Use some strategic tools
- **Lead Emerging Technologies**
- **Be the Technology Conscience of the Organization**
- **Educate Yourself (and your team) on Executive Skills**

Your Feedback

The Future

- IT Organization Under Siege
- CIO Role Going Away?
- A Number of Positive Options Exist

Source of Wealth*

Agriculture Economy		Land
Industrial Economy		Means of Production
Information Economy		Knowledge

*Charles Handy

The Vision



Our Plans

- Develop an Advanced Curriculum
- A Competency Model
- Courses Plus Field Work
- In-depth Specialty Courses
- Pilot Course

Specialty Courses

- Delivering Strategic Value
- Effective Interpersonal Skills
- Marketing the IT Organization
- Leading Technological Change
- Understanding the Business
- MBA Type Content

Final Thought

“The future is up to us. We can stand by passively and let it happen to us, or alternatively, we can work to create a brighter, more positive future for ourselves, our organizations and our profession.”

Contact Information

Pete DeLisi

510-490-1723

petedelisi@aol.com

www.org-synergies.com

<http://www.scu.edu/business/edc/programs/info-tech-leadership.cfm>

Future Agenda Items

Call for agenda items

Next Meeting October 14th