

# The Essential Ten-Step Guide to Building & Communicating Your CIO Strategy for COVID-19

March 26, 2020

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RESEARCH GROUP

# This Is the CIO Career Opportunity of the Decade

This plan is designed to help CIOs build and communicate a clear strategy for the next 90 days. This is a key time for CIOs to demonstrate leadership and technology capability.

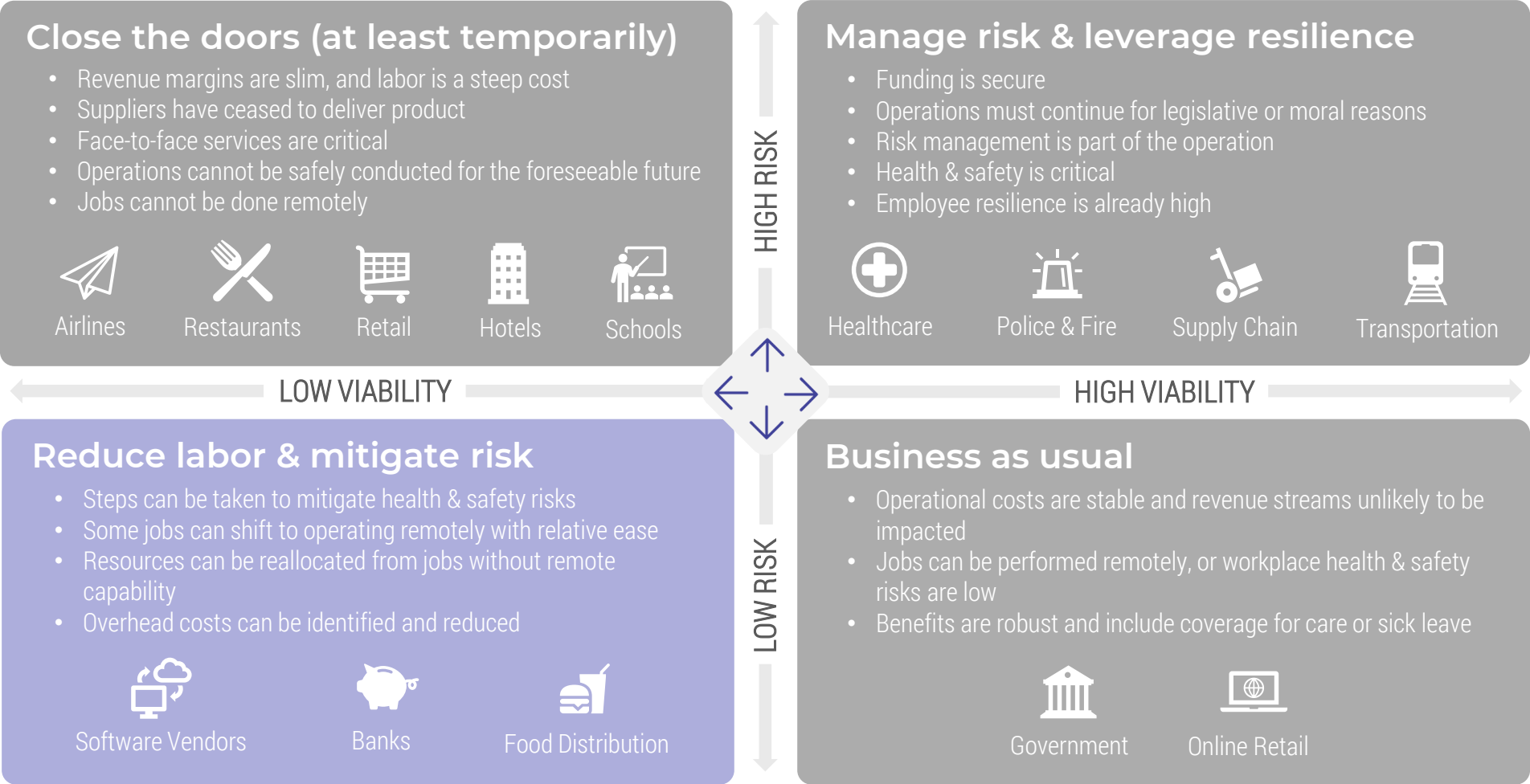
Use this document to build a plan for the next 30-90 days for how you can help your organization and your department thrive in spite of the COVID-19 pandemic.

The CIO will play a critical role across this crisis and this is an opportunity to shine.

# Every CIO has a unique leadership opportunity to radically impact their organization during this crisis

The opportunities & challenges faced by each CIO depend on their industry & organization's priorities.

This CIO COVID-19 strategy guide provides a ten-step planning methodology to prioritize action & communicate with your executive team.



# Info-Tech's Ten-Step IT Pandemic Strategy Overview

Step	Title
1	<a href="#"><u>Prepare IT to Support the Business: Establish an Emergency Governance Committee</u></a> <ul style="list-style-type: none"><li>• To keep pace with the pandemic, we must accelerate our decision-making framework in the short term while maintaining alignment to our immediate corporate priorities and long-term goals. Keeping IT employees productive, enabled, and engaged is job #1. Failure to prepare will impact the entire organization.</li></ul>
2	<a href="#"><u>Inspire Extraordinary Effort: Overdeliver on Executive Priorities</u></a> <ul style="list-style-type: none"><li>• Understand our corporate priorities and align IT resources to those priorities. We are asking IT employees for <i>extraordinary effort</i> in this time of crisis.</li></ul>
3	<a href="#"><u>Don't Just Make Technology Work, Make It Awesome!</u></a> <ul style="list-style-type: none"><li>• Support business continuity with IT solutions. Here are the core IT services we will focus on to facilitate work from home (WFH) and other corporate pandemic measures.</li></ul>
4	<a href="#"><u>Focus on Revenue &amp; the Real End Customer</u></a> <ul style="list-style-type: none"><li>• Corporately, we are focusing on revenue generation during the pandemic. We must focus our IT capabilities and support on the end customer to protect the bottom line.</li></ul>
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7	<a href="#"><u>Re-Prioritizing Project Backlog: Keep Key Projects Moving Forward</u></a> <ul style="list-style-type: none"><li>• Some projects should be halted, some scaled back, some pushed forward, and others started. Determine which is which.</li></ul>
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9	<a href="#"><u>Prepare for the Economic Downturn</u></a> <ul style="list-style-type: none"><li>• Cutbacks are on their way. We will be asked to do more with less. Our governance model will need to adapt to the new reality,</li></ul>
10	<a href="#"><u>Use This CIO Pandemic Strategy Template</u></a> <ul style="list-style-type: none"><li>• It's time to turn strategy into tactics. This is a key project: run it like one.</li></ul>

# 1. Prepare IT to Support the Business: Institute an Emergency IT Governance Model

Keeping IT employees productive, enabled, and engaged is job #1. Failure to prepare will impact the entire organization.

## Create an Emergency IT Governance Committee

Governance models are effective at providing oversight during normal operating times; however, they often crumble under speed or economic pressure.

The COVID-19 pandemic has focused our need to accelerate decision-making windows while maintaining risk tolerance and alignment to long-term business objectives.

For the near term, we must realign our governance model around protecting employees while maintaining corporate revenue.

## Key Insights

1. Support your team, keep them safe, and build a back-up plan for key roles. The stage of initial crisis management and communication has passed.
2. Establish clear roles and responsibilities across IT to help the organization respond rapidly.
3. Communication and re-training on WFH and remote working technology is critical. Assume previous IT training wasn't a priority and everyone needs a refresher on all remote technology and any change they need to manage through. Don't begrudge the time. The re-training investment will pay dividends.



## 2. Inspire & Overdeliver

This is the time for each CIO to reach out to each key executive and find a way to deliver results in half the time.

### Inspire your team to deliver extraordinary results across impossible timelines.

In this time of crisis, CIOs must ask their teams to overdeliver.

As a CIO, you need to use your leadership skills to communicate to your team the importance of speed and impact. Your team is in a unique position to mitigate the damage the COVID-19 crisis can inflict on your businesses and your team's livelihoods.

Your team wants to help; they want to make a difference. Now is the time to ask the IT team for extraordinary effort.

Ask your team to work beyond normal hours and find ways to rapidly solve problems. Now is the time to cash in the goodwill you have stored up with your team and ask them to deliver extraordinary results across impossible timelines.

Inspire your team and make sure that the extra effort and hours are recognized.

Now is the time to make a difference.

### Key Insights

1. Your team wants to help; they want to make a difference. Now is the time to ask the IT team for extraordinary effort.
2. Reach out to the CEO and each senior business stakeholder; offer your support, then surprise and delight them by asking for additional projects and requirements. Ensure you ask and don't assume corporate priorities.
3. In this time of crisis, find new ways to exceed expectations and build your IT department's reputation.

# 3. Make Technology Awesome!

Business continuity, disaster recovery, and work-from-home & collaboration technology should already be in place.

**Most IT departments should already have the core processes and technology in place to enable business continuity.**

Most IT departments already have business continuity plans; it's time to put them to the test.

Please refer to our industry-specific COVID-19 material or detailed technology blueprints if you need to rush to put in place extensions to your core work-from-home or technology initiatives.

For many IT organizations, the core technology and processes are already in place to handle this crisis; it's how you manage the execution that matters.

There are four ways Info-Tech recommends each IT department manage the execution to help the IT department not only survive, but also shine during this crisis.

## Key Insights

1. Celebrate and promote individuals on your IT team who can be made into heroes across the firm as key processes and technologies have success. Have fun celebrating and promoting these individuals on your team so the rest of the organization has someone specific they can appreciate.
2. Proactively reach out to business leaders; monitor critical infrastructure and key functions for unexpected issues.
3. Overstaff the help desk function temporarily; perform proactive outreach to ensure everything works as people adjust to working from home.
4. CIOs should lead consistent communication across their team and the broader organization where possible.

# 4. Focus on the Customer

Many companies will be forced to manage a significant reduction in revenue.

## CIOs need to help support revenue generation.

Depending on your industry and your position on our crisis quadrant, most organizations are facing an impact on revenue.

Unless you're lucky enough to have Google-like margins, most organizations will need to mitigate a drop in revenue with a corresponding drop in costs.

Helping your organization find ways to survive the revenue reduction will be the CEO's top priority.

CIOs need to identify and focus on initiatives that help the CEO as they work to ensure the organization survives, thrives, or attacks in this new pandemic crisis that has in record time had a unprecedented impact.

In every industry there will be winners and losers with this change. CIOs have the opportunity to innovatively leverage technology to help the organization attack and gain market share, thrive, or just survive.

## Key Insights

1. Most organizations expect to manage a drop in revenue and demand. CIOs should focus on understanding how the CEO & chief revenue office need support. Understand the corporate strategy: Attack, Thrive, or just Survive.
2. CIOs should focus on supporting existing customers and constituents as a top priority.
3. Support business processes that need to become remote and less dependent on travel or in-person visits. Prioritize new digital processes that enable the company to continue to deliver and sell where possible.
4. Technology innovation delivered quickly will absolutely impact market winners and losers across all industries. Now is the time to consider technology-enabled innovation.



# 5. Protect Core IT Operations & IT Process

With social distancing, every organization's operations have been disrupted to some degree.

## Expect strain on IT infrastructure, systems & process.

The first necessity is to provide basic infrastructure. It is imperative that basic infrastructure functions.

On the right we've outlined four action items CIOs should consider to ensure that core IT operations continue to run smoothly.

As all Info-Tech members will know, CIOs need to set expectations that IT has a role to play beyond providing a dial tone and basic infrastructure.

Once core infrastructure is in place, CIOs should move on to high-value IT functions.

Info-Tech recommends asking senior executives if they have the need for any new reporting and analytic capabilities to assist in monitoring the organization's core health metrics or reporting that can help with the transition to a work-from-home environment.

## Key Insights

1. Manage a short-term surge in demand for key systems & processes needed across the crisis:
  - Help desk; remote work capabilities
  - Customer-facing websites & call centers
  - End-user security training
2. Some IT staff will need to be re-deployed.
  - Be aware of who on your team is experiencing a drop in demand or can not perform their job at home; re-deploy them.
3. Keep existing projects and priorities moving forward.
  - Keep the team focused on delivering on pre-crisis projects wherever possible. Don't let panic derail critical projects.
4. Don't just survive – build key long-term IT capabilities.
  - In particular, focus on remote delivery capabilities.

# 6. IT Must Help Lead Business Process Innovation

With social distancing, every organization's operations have been disrupted to some degree.

## Key Insights

**While “social distancing” will disrupt most organizations, technology innovations will catapult IT into a leadership position.**

While manufacturing and supply chains are facing unprecedented and widely understood disruption, other industries such as insurance, government, and financial institutions still use paper documents for key processes. Some of these organizations will grind to a halt as the mailroom shuts down.

While some companies focus only on survival, others will seek to steal long-term market share.

As CIO, it's your responsibility to understand how technology can be used to alter and disrupt processes inside of your industry. Capitalize on the disruption to offer solutions that would have seemed impossible to implement or manage the change in the past. Never let a good crisis go to waste.

1. Understand within your industry how technology can and will be used to innovate. New habits will be formed, and competitive positioning inside of some industries will change in the long run.
2. This is an opportunity for CIOs to lead digital transformation initiatives that have long-term value. Move forward with well-researched and understood digital transformation projects.
3. Fast track any innovation initiatives in your portfolio that enable work-from-home strategies or remote delivery of product and services.
4. Understand that fast tracking transformational change without sufficient testing, experiments, and data is extremely risky. Perhaps in some situations and industries it is warranted but go in with eyes wide open. It is difficult to put the genie back in the bottle.

# 7. Re-Prioritize the IT Project Backlog: Keep Key Projects Moving Forward

Some projects should be halted, some scaled back, some pushed forward, and others started. Determine which is which.

**You need to make room for pandemic-related projects, but don't destroy forward momentum in the process.**

The current crisis will undoubtedly affect the prioritization and rollout of your existing IT projects.

Info-Tech recommends a full re-prioritization of your existing projects. Make sure to work with executive sponsors to understand their new priorities and changes to projects in flight.

## Key Insights

1. Work with senior-most stakeholders to help the organization through the eye of the storm.
2. Don't just assume that all projects' priority remains the same. Assign someone on your team to reset priorities across the portfolio.
3. Continue to move forward; don't delay projects unless you have clear buy-in from the executive team.

# 8. Security Priorities in a Pandemic

Hackers love a crisis. Be prepared to secure and privatize your new environments in the face of new threats.

## The last thing you need in the middle of a pandemic is a brand-new security crisis.

We have to be proactive about closing new security gaps that are the result of rapid process changes. Nature abhors a vacuum and so do hackers. They will sweep into the space exposed by remote workers, empty buildings, and vacant streets and take any advantage they can find.

Let's also prepare to address the vulnerabilities brought on by a remote workforce. Many home offices are not secure, with antiquated internet routers configured with default admin privileges and passwords.

Make sure that remote staff have a clear communication process to validate any change in process. Teach all end users to err on the side of caution. Focus considerable energy on end-user security awareness in this new reality.

## Key Insights

1. Focus on end-user security training. Hackers will attempt to victimize new work-from-home employees. Begin here.
2. Physical office security is an increased risk. With everyone aware of work-from-home policies, take extra precautions with physical security.
3. Re-visit and review your security strategy. Your security posture may have changed when the world pivoted under the virus. Be sure your risk tolerance is still what it was before COVID-19.

# 9. Manage IT Budget Cutbacks to Preserve IT Capabilities

Cutbacks are on their way. You will definitely be asked to do more with less. Here are some tactics to use to keep throughput high.

**Info-Tech has prepared a process to help IT leaders work through budget cutbacks while preserving key capabilities.**

Visit our [Budget & Cost Center](#) to work through this process.

There are over 45 customizable strategies to cut back IT costs and maintain core capabilities.

## Key Insights

1. The plan you build, and strategy we recommend, depends on the budget cutbacks you need to achieve.
2. Work through the 45+ different approaches to reduce costs in four categories:
  1. Asset Optimization
  2. Vendor Optimization
  3. Workforce Optimization
  4. Project Prioritization
3. Build a boardroom-ready strategy to help you communicate upwards and within your organization.

# 10. Use This CIO Pandemic Strategy Template

It's time to turn strategy into tactics. Below is a timeline summary of these strategic pandemic initiatives and a more future-oriented look at where we will go in the months to come. This is a key project: run it like one.

## The project management triangle of scope, resources and time still apply.

This is not unfamiliar territory. As you draft your COVID-19 pandemic strategy for IT, be sure you design and execute the tactic in an orderly, controlled fashion. That means run it like a typical IT project.

Info-Tech has provided a template to communicate high-level strategic plans and incorporate a longer-term view of possible future post-pandemic initiatives.

CIOs should run this pandemic strategy as a project with tasks, resources, and timelines. Assign ownership for initiatives to key IT personnel and ensure they have identified backup personnel in case of illness. None of these initiatives can afford to fail.

## Key Insights

1. The IT Pandemic Response Team Leader should ask for regular updates against each of these initiatives. Each initiative can be run as an independent project, but be aware of dependencies between them. Governance, for example, may need to be dealt with quickly if it is required to make process or resource decisions in your organization.
2. Assign IT leaders to each initiative listed in this strategy. Each IT leader should functionally decompose each initiative to arrive at more accurate estimates for each initiative and maintain them as part of a centralized project. Assign a project owner and project manager. Track resources like any critical project.
3. Keep a central version of the plan in your knowledgebase and ensure key personnel keep it updated.
4. As events unfold over the coming months, revise these initiatives and update the plan and the sunrise diagram.
5. Be prepared for a long planning horizon. Who knows how long this crisis will last?



The background of the slide features a series of concentric, wavy blue lines that create a sense of movement and depth, resembling a stylized wave or a topographical map. The lines are more densely packed in some areas, creating a gradient of blue tones from light to a slightly darker shade.

# **APPENDIX A**

Use this COVID-19 IT Pandemic Strategy Template to quickly  
customize your own strategy.

# **XMPL Co.'s COVID-19 Pandemic IT Strategy**

IT's plan to support XMPL Co.'s Pandemic Response Plan 2020.

Mark Croft, CIO, XMPL Co.  
March 26, 2020

# Message From the CIO

COVID-19 has caused XMPL Co. to enact our Pandemic Response Plan. IT will shift all resources necessary to support our business through the global pandemic.

*Team,*

*The global COVID-19 pandemic requires us all to take extraordinary measures to keep our employees and customers safe, to protect the organization during the ensuring economic downswing, and to recover and resume normal operations once the emergency measures are lifted and business returns to a stable state.*

*To respond to the crisis, XMPL Co. has drafted and enacted our corporate Pandemic Response Plan based on our existing Crisis Response Plan and Business Continuity Plan.*

*Together, we must act with teamwork, collaboration, and speed to ensure IT is able to help our business through this crisis. To that end, I will be asking each of you to read and understand this IT Pandemic Strategy document and begin to enact the measures described herein.*

*Our priorities are listed here and described more fully below.*

*Thank you all for the extraordinary effort we will put forth over the coming weeks and months, if necessary, to see our organization through this transition.*

*With Respect,*

*M. Croft*

*Mark Croft, CIO, XMPL Co.*

## Next Steps

1. Prepare IT to Support the Business: First Steps
2. Extraordinary Effort: Overdeliver on Executive Priorities
3. Don't Just Make Technology Work, Make It Awesome!
4. Focus on Revenue and the Real End Customer
5. Protect Core Operations & IT Process
6. Capitalize on Emergency Business Process Innovations
7. Re-Prioritizing Project Backlog: Keep Key Projects Moving Forward
8. Review & Revise Security Priorities in a Pandemic
9. Establish and Emergency Governance Committee
10. Prepare for the Economic Downturn



# Info-Tech's Ten-Step IT Pandemic Strategy Overview

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# 1. Prepare IT to Support the Business: Establish an Emergency Governance Committee



IT Owner: Suzanne Valente, VP  
IT Operations

Keeping IT employees productive, enabled, and engaged is job #1. Failure to prepare will impact the entire organization.

## Currently

- Our first priority is to ensure our IT staff can support the demand of the business as they shift to WFH scenarios, remote team management, and loss of access to expected corporate resources. We have developed a crisis response to mitigate these demands.
- To do this, we have:
  - Identified IT's Pandemic Response Team
  - Prioritized key IT personnel
  - Enabled and tested remote access to key IT systems
  - Authorized and communicated overtime requirements for essential IT services
  - Identified backup personnel for key IT personnel
  - Trained backup personnel on key IT functions
  - Drafted, approved, and sent communication for IT employees
  - Deployed HR's remote employee management training
  - Deployed HR's remote employee engagement training

## Next Steps

1. All IT staff to review WFH policies and other policies executed in our Pandemic Response Plan.
2. All IT staff to move to WFH effective immediately.
3. All IT staff to review the key personnel chart and Pandemic Response Team list below.
4. Key IT personnel to ensure key processes effective in a WFH scenario (use the key personnel chart below).
5. Backup personnel to refresh themselves on key processes in case of emergency.
6. All IT managers to participate in Remote Employee Management Training sessions hosted by HR.
7. All IT staff to participate in Remote Employee Engagement Training.
8. Establish an Emergency IT Governance Committee.

# Pandemic Response Teams

## Corporate Pandemic Response Team

Role	Primary	Alternate	Responsibilities
<b>Team Leader</b>	Mike Hernandez, CFO		<ul style="list-style-type: none"> <li>Lead the crisis assessment.</li> <li>Function as the liaison with the executive team (e.g. communicate crisis status).</li> <li>Coordinate emergency response, crisis communications, and business continuity efforts.</li> </ul>
<b>Crisis Communications</b>	Sandy Levine, VP, Marketing & Communications		<ul style="list-style-type: none"> <li>Assist with initial assessment from a public relations perspective.</li> <li>Lead the crisis communications effort.</li> </ul>
<b>IT</b>	Mark Croft, CIO		<ul style="list-style-type: none"> <li>Assist with initial assessment from an IT perspective.</li> <li>Facilitate IT response, including support for crisis communications and business continuity efforts.</li> </ul>
<b>HR</b>	Dave Branch, HR Manager		<ul style="list-style-type: none"> <li>Assist with initial assessment from an HR perspective.</li> <li>Provide HR support as needed (e.g. monitor recommendations from local health officials, support work-from-home planning).</li> </ul>
<b>Legal</b>	Susan Ridley, VP, Legal		<ul style="list-style-type: none"> <li>Assist with initial assessment from a legal perspective.</li> <li>Provide legal support as needed (e.g. ensure the crisis response meets legal requirements).</li> </ul>
<b>Facilities</b>	David Lee, Facilities Manager		<ul style="list-style-type: none"> <li>Assist with initial assessment from a facilities perspective.</li> <li>Manage facility implications (e.g. additional security monitoring if staff are working from home, facilitating social-distancing measures).</li> </ul>

## IT Pandemic Response Team

Role	Primary	Alternate	Responsibilities
<b>IT Pandemic Sponsor</b>	Mark Croft, CIO	Suzanne Valente, VP, IT Operations	<ul style="list-style-type: none"> <li>Assist with initial assessment from an IT perspective.</li> <li>Facilitate IT response, including support for crisis communications and business continuity efforts.</li> <li>Direct communication with Corporate Pandemic Response Team.</li> </ul>
<b>IT Pandemic Response Team Leader</b>	Suzanne Valente, VP, IT Operations	Sid Travis	<ul style="list-style-type: none"> <li>Coordinate all IT resources.</li> <li>Convene and chair IT Response Meetings.</li> <li>Communicate requirements and decisions to IT Pandemic Sponsor.</li> </ul>
<b>Infrastructure</b>	Sid Travis	Bob Halder	<ul style="list-style-type: none"> <li>All infrastructure-related pandemic technology and processes.</li> </ul>
<b>Applications</b>	Wan Hoi	Sally Fields	<ul style="list-style-type: none"> <li>All application-related pandemic technology and processes.</li> </ul>
<b>Security</b>	Martha Shank	Pat Fields	<ul style="list-style-type: none"> <li>All security-related pandemic technology and processes.</li> </ul>



# Key IT Employees & Processes

## Key IT Processes, Personnel & Alternates

Role	Primary	Alternate	Processes & Responsibilities
CIO	Mike Hernandez, CFO	Wan Hoi	<ul style="list-style-type: none"><li>Lead the crisis assessment.</li><li>Function as the liaison with the executive team (e.g. communicate crisis status).</li><li>Coordinate emergency response, crisis communications, and business continuity efforts.</li></ul>
Service Desk Manager	Jane Ivanov	Jessica Stanton	<ul style="list-style-type: none"><li>Support business staff in pandemic response.</li><li>Coordinate service desk personnel and processes.</li></ul>
Security Manager	Martha Shank	Pat Fields	<ul style="list-style-type: none"><li>Security Incident Response Manager</li><li>Security policy updates</li><li>Employee security awareness training</li></ul>
Payroll Processing	Fred Smith	Jake Jacobs	<ul style="list-style-type: none"><li>Manual batch job scheduling for payroll every two weeks.</li></ul>
Security Monitoring	Martha Shank	Jerry Stewart	<ul style="list-style-type: none"><li>Monitor and report on intrusion detection.</li></ul>

Role	Primary	Alternate	Processes & Responsibilities
IT Employee Health Checks	Josh Garner	Mary Sanction	<ul style="list-style-type: none"><li>Track employee health and ability to perform key functions.</li><li>Notify alternatives when necessary.</li><li>Identify and train new alternates with necessary.</li></ul>
Employee WFH Issue Management	Jane Ivanov, Director IT Service Desk	Jessica Stanton	<ul style="list-style-type: none"><li>Prioritize WFH support as key IT issue.</li><li>Identify, triage, and quickly resolve WFH issues using standard service desk operations.</li></ul>

# COVID-19 IT Pandemic Strategy: RACI

Action	R	A	C	I
1. Prepare IT to Support the Business: First Steps	Suzanne Valente, VP, IT Operations	Mark Croft, CIO	Business leads, Mark Croft, Business users	IT – all
2. Extraordinary Effort: Overdeliver on Executive Priorities	Suzanne Valente, VP, IT Operations	Mark Croft, CIO	Business leads, Mark Croft, Business users	IT – all
3. Don't Just Make Technology Work, Make It Awesome!	Mark Cousins, Director, IT Infrastructure	Sid Travis, VP, IT Infrastructure	Business leads, Mark Croft, Business users	IT – all
4. Focus on Revenue and the Real End Customer	Cole Coltrane, Director, IT Applications	Wan Hoi, VP, IT Applications	Business leads, Mark Croft, Business users	IT – all
5. Protect Core Operations & IT Process	Jane Ivanov, Director, IT Service Desk	Suzanne Valente, VP, IT Operations	Business leads, Mark Croft, Business users	IT – all
6. Innovative Business Process Changes	Lisa Arlene, IT Applications Lead	Wan Hoi, VP, IT Applications	Business leads, Mark Croft, Business users	IT – all
7. Re-Prioritizing Project Backlog: Keep Key Projects Moving Forward	Suzanne Valente, VP, IT Operations	Suzanne Valente, VP, IT Operations	Business leads, Mark Croft, Business users	IT – all
8. Security Priorities in a Pandemic	Jerry Stewart, Director, IT Security	Martha Shank, VP, IT Security	Business leads, Mark Croft, Business users	IT – all
9. Establish an Emergency Governance Committee	Mark Croft, CIO	Mark Croft, CIO	IT VPs, Mark Croft, IT Steering Committee	IT – all
10. Prepare for the Economic Downturn	Suzanne Valente, VP, IT Operations	Mark Croft, CIO	Business leads, Mark Croft, Business users	IT – all

# Establish an Emergency Governance Committee

To keep pace with the pandemic, we must accelerate our decision-making framework in the short term while maintaining alignment to the corporation's immediate priorities and long-term goals.

## Pandemic IT Governance

- Our current governance model is effective at providing oversight during normal operating times; the COVID-19 pandemic has focused our need to accelerate decision-making windows while maintaining risk tolerance and alignment to long-term business objectives. For the near term, we must realign our governance model around protecting employees while maintaining corporate revenue.
- To do this, we have:
  - Convened an emergency meeting of the IT Steering Committee.
  - Explained the need for modifications to our governance model.
  - Asked for committee members' time to help quickly establish a new temporary governance model and communicate this model to the CIO, CEO, and the Board of Directors.

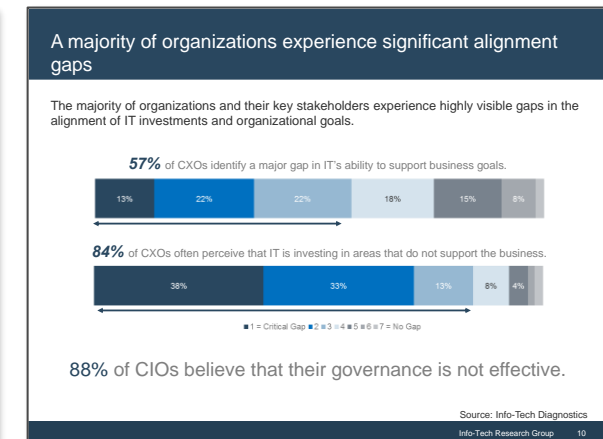
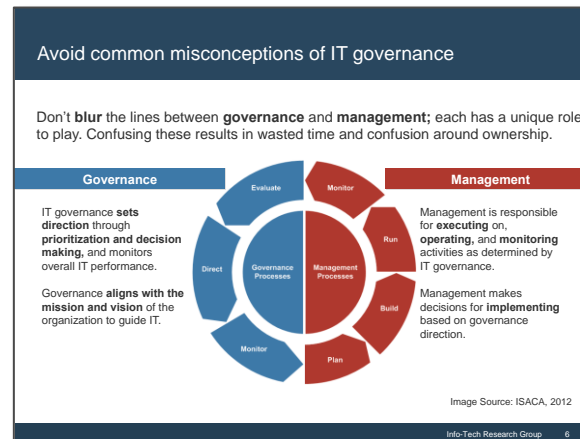
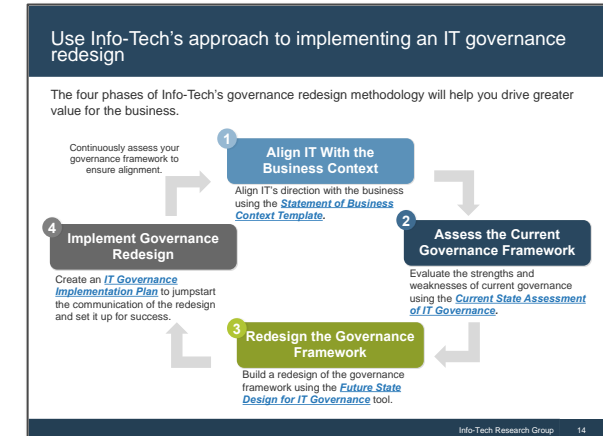
## Next Steps

1. The CIO will work with the IT Steering Committee members to quickly establish a new governance framework.
2. The CIO will identify the current roles, purpose, and decision areas for governance bodies across the organization and then mold the existing governance system into a streamlined emergency framework that can weather the effects of any cutbacks.
3. The CIO will engage the Crisis Response Team and relevant business stakeholders for emergency governance changes.
4. The team will address the concerns of the stakeholders who have the most power and who are most impacted by the IT governance redesign.
5. The Emergency Governance Committee will govern decision making with a short-term focus on pandemic response.

# We will establish an Emergency Governance Committee

IT governance is the glue that holds things together, not the red tape that holds us back.

Our governance methodology must support the enablement of IT-business alignment, decrease decision-making cycle times, and increase IT's transparency and effectiveness in decisions around benefits realization, risks, and resources. We will use Info-Tech's methodology for establishing IT governance as the basis for our Emergency Governance Committee.



## 2. Overdeliver on Executive Priorities



IT Owner: Suzanne Valente, VP  
IT Operations

Understand our corporate priorities and align IT resources to those priorities. We are asking IT employees for extraordinary effort in this time of crisis.

### Currently

- Our second task is to capture and understand our executive & corporate priorities so we can align IT resources to those priorities.
- To do this, we have:
  - Attended Pandemic Response Team meetings
  - Enacted our Pandemic Response Plan
  - Documented our corporate priorities and policies
  - Reviewed and prioritized key IT processes to align each to a corporate priority
  - Assessed where we will need additional IT resources and where it will come from
  - Discussed resource redeployment with affected IT managers
  - Asked all IT managers to communicate and solicit extraordinary effort from our IT staff members

### Next Steps

1. All IT employees to review corporate priorities and initiatives below.
2. All IT employees to adhere to the corporate pandemic response plan.
3. All IT employees to review their key processes with their managers to ensure they align with corporate priorities (see below).
4. All IT employees to review the IT pandemic response initiatives below to understand how individual efforts can contribute to the corporate priorities.
5. Mark Croft and Suzanne Valente are enacting an emergency governance model to streamline requests and approvals for IT resources; details are below in Step 9 (Emergency Governance During Cutbacks).

# Corporate Priorities

During the COVID-19 Pandemic



Immediate Work From Home:  
All Non-Essential Employees

All non-essential personnel to start a work-from-home program effective immediately. See Pandemic Response Plan for details.



Implement Social  
Distancing: Remaining  
Essential Employees

All essential personnel, who have not moved to WFH, immediately begin social distancing efforts.



Enact Pandemic Policy

Each department to read and enact the conditions outlined in our corporate pandemic policy. For clarification, contact the IT lead.



Focus on Revenue

Potentially the first impact of the pandemic could be a short-term hit on revenue cashflow. Decision making should adjust to provide the most support to those processes resulting in short-term positive cash flow.



# Corporate Priorities

During the COVID-19 Pandemic



Immediate Work From Home:  
All Non-Essential Employees



Implement Social  
Distancing: Remaining  
Essential Employees



Enact Pandemic Policy



Focus on Revenue

# IT Initiatives

During the COVID-19 Pandemic



1. Deploy MS Teams to all employees
2. Increase network bandwidth to key resources
3. Provide remote WFH support
4. Enable and monitor security infrastructure



1. Determine facilities impact
2. Provide equipment sanitization procedures and materials
3. Update videoconference software for remaining in house users
4. Secure the data center



1. Review and assess other pandemic policies for IT impact
2. Facilitate training for IT staff on these policies
3. Enforce policies



1. Determine and analyze key revenue processes
2. Determine IT impact on those processes
3. Optimize processes for maximum technology impact

### 3. Don't Just Make Technology Work, Make It Awesome!



IT Owner: Mark Cousins, VP IT Infrastructure

Support business continuity with IT solutions. Here are the core IT services we will focus on to facilitate work from home and other corporate pandemic measures

#### Currently

- We have identified the following technologies as essential to support the corporate priorities and initiatives described above
- Key technologies/IT processes & owners to support corporate pandemic initiatives
  - MS Teams for all employees (Jerry Baker)
  - In-house corporate videoconferencing (Richard Flack)
  - Remote call and activity recording for front-line sales staff (Dave Peterson)
  - Network capacity and bottleneck monitoring (Derek Sousa)
  - Remote employee support via service desk (Sandi Smith)
  - VPN access to corporate in-house systems (Derek Sousa)
  - Virtual desktops for key non-relocatable corporate systems (Casey Marlow)
  - We have identified six key technologies we need to improve for long-term viability, see next slide for details

#### Next Steps

1. Each technology owner to review their systems to ensure they can support WFH initiatives.
2. Each technology owner to prepare change assessment and submit to the IT Pandemic Response Team Leader (Suzanne Valente).
3. IT Pandemic Response Team Leader will work with Pandemic Response Team to prioritize changes and obtain approval from the IT Pandemic Sponsor (Mark Croft).
4. Team will recommend any necessary gaps and omissions, redundancies, and clarifications.
5. Upon approval, teams will deploy changes.

***6. Key Focus: Make Supporting Technology Awesome!***

# Pandemic Technology Strategy

Six Key Technologies We Need to Make Awesome!

## Collaboration Software

In a WFH culture, we not only need to enable collaboration, we need to implement technology to foster and improve it.

## Network Access and Speed

In a WFH world, our corporate network is not the only single point of failure on our network: rather it is every employee's home internet connection.

## Corporate Resource Access

Temporary lack of access to corporate digital resources is fine; but long term, we need a better solution.



## Customer Communications

Customers need direct, immediate access to our WFH employees. Temporary workarounds are fine, but we need a sustainable communication strategy.

## Supply Chain Continuity

We have short-term mitigations for disruption in supply chains; we need reliable long-term innovations to keep our products moving.

## Corporate Communication

The pandemic situation changes daily; we need robust digital communication lines and processes to keep everyone in the loop.

# Technology Assessment #1: Collaboration Software

In a WFH world, employees need new tools to enable collaboration. While we have already deployed MS Teams as our primary collaboration toolkit, we now need to make it an awesome experience for all employees.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation
Remote Meetings					
Chat					
Video					
Telephony					
Whiteboards					
Webinars					
Training/LMS					
Etc.					

# Technology Assessment #2: Network Access and Speed

In a WFH world, our corporate network is not the only single point of failure on our network: rather it is every employee's home internet connection.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation

# Technology Assessment #3: Corporate Resource Access

Temporary lack of access to corporate digital resources is fine; but long term, we need a better solution.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation
Payroll Reporting					
Corporate Intranet					
Benefits Systems					
Recruiting Software					
Etc.					



# Technology Assessment #4: Customer Communications

Customers need direct, immediate access to our WFH employees. Temporary workarounds are fine, but we need a sustainable communication strategy.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation
Customer Support – Web					
Customer Hotline					
Chat Support					
Social Media Monitoring					
Inbound Sales					
Etc.					

# Technology Assessment #5: Supply Chain

We have short-term mitigations for disruption in supply chains; we need reliable long-term innovations to keep our products moving.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation

# Technology Assessment #6: Corporate Communication

The pandemic situation changes daily; we need robust digital communication lines and processes to keep everyone in the loop.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation
Corporate Intranet					
Email					
Company Meetings					
Quarterly Reporting					
Team Management					

## 4. Focus on Revenue and the Real End Customer



IT Owner: Cole Coltrane, VP IT Applications

Corporately, we are focusing on revenue generation during the pandemic. We must focus our IT capabilities and support on the end customer to protect the bottom line.

### Currently

- We have been asked to focus more attention on revenue-generation activities and processes and determine what we can do to boost sales and support end customers during the crisis
- To do this, we have:
  - Identified and prioritized business processes requiring IT focus (see next page)
  - Scheduled working sessions to determine ways in which we can better support our end customers as they experience the same level of displacement and restriction as we are experiencing

### Next Steps

#### 1. Revenue Focus:

- Technology leaders to meet with business sponsors for these areas to determine immediate and near term requirements; use the BIA or BPP tool below to complete a process assessment.
- Focus on short-term workarounds.
- Pivot to longer-term innovations as appropriate.
- Make the technology support awesome!

#### 2. End-Customer Focus

- IT managers to arrange appropriate attendees for end-customer working sessions using Info-Tech's CXM toolkit.
- Document any findings and submit to IT Pandemic Response Leader.
- IT managers to execute based on approval from the Response Leader.

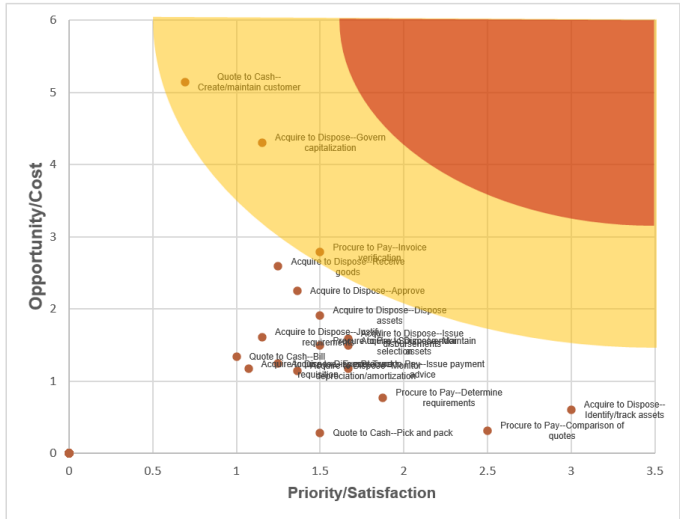
# Focus on improving revenue by identifying and prioritizing revenue generation business processes

Use [Info-Tech's Business Process Prioritization Tool](#) to quickly adapt our approach

## Identify Key Candidates for Process Automation

**Purpose:** Use this worksheet to identify those processes that are most important to the enterprise. The chart puts high relative opportunity processes with low satisfaction in the top right corner.

**Instructions:** Review the identified processes. Processes in the top right corner should be priorities for assessment. If the chart provides too much detail, adjust the visibility of the processes with the "Display in Plot" option in the tab "Evaluate Business Processes."



Use the first three tabs of this Excel Spreadsheet tool to conduct a business impact analysis (BIA). Quickly go through the tabs from left to right to complete the analysis. In this COVID-19 scenario, you are only going to focus on the first three tabs. RTO/RPO are not the point of this exercise; rather it is to prioritize revenue-generating functions according to impact and criticality.

Each tab is described below:

1. Processes and Dependencies: List the business processes/functions and dependencies to be assessed. In this case, focus all your efforts on Revenue Opportunity Processes.
2. Scoring Criteria: Define the scales that will be used throughout this tool to measure business impact and criticality of those revenue opportunities.
3. Impact Analysis: Determine the impact of the process. This priority order will help you figure out which processes to analyze in more detail.

# Alternate approach to revenue generation business processes

We also used Info-Tech's *BCP Business Impact Analysis Tool* to identify high-impact/critical-need revenue generation and related processes. Click [here](#) to access the spreadsheet. For each critical revenue process, the technology owner will build a technology improvement plan.

Business Processes/Functions												
Use the table below to list the applications/systems and dependencies to be assessed on the Impact Analysis tab.												
<b>Note:</b> - Please do not delete or insert rows or cells as this will impact underlying calculations and cross-references. Text can be deleted, but not cells. For example, to delete text from a series of cells, select the cells and click Delete on your keyboard; do not use the Delete Cells option on the Excel toolbar. - Mark critical dependencies with an asterisk (e.g. *SAN) to have these highlighted in the rest of this tool.												
ID	Process/Function	Description	Process Owner	Dependencies – People		IT Applications/Data/Services (i.e. components covered by your IT DRP) (e.g. applications, databases)		End-User Devices/Equipment (e.g. PCs, Phones, Printers, Scanners)		Facility Location (e.g. secure office, wickets)	Requirements	
				Primary	Alternatives	Primary	Alternatives	Primary	Alternatives	Primary	Alternatives	
1	Order Intake	Record and process customer orders received by phone or online.		Order Intake Manager	Order Intake Team Leader	AdvancePro	Record on paper for later entry (doesn't support downstream processes)	PCs x 12	Re-purpose PCs from less-critical functions (to be defined)	Warehouse Office (standard office space)	Corporate HQ	
				Order Intake Team Leader	Senior order intake staff member	Internet	None (wait for IT DR completion)	Telephones x 12	Cell phones (company phones)			
				Order intake staff x 10	Staff from other shifts	Email	Phone					
						OrderOasis	Sales reps can call/email orders					
						Fax Line	Call scheduled customers via cell phone to get their order					
						FTP	Call scheduled customers via cell phone to get their order					
2	Purchasing	Order product to stock warehouses.		Purchasing Manager	Purchasing Team Leader	AdvancePro	None (wait for IT DR completion)	PCs x 7	Re-purpose PCs from less-critical functions (to be defined)	Corporate HQ (standard office space)	Warehouse Office	XMPL
				Purchasing Team Leader	Senior purchasing staff member	Email	Phone	Telephones x 7	Cell phones (company phones)			
				Purchasing staff x 5	Staff from other shifts							
3	Order Trends Reporting	Produce the daily order trends report to support the purchasing process and long-term supply-chain management.		Purchasing Manager	Purchasing Team Leader	AdvancePro	None (wait for IT DR completion)			Corporate HQ (standard office space)	Warehouse Office	
				Purchasing Team Leader	Senior purchasing staff member							
				Purchasing staff x 5	Staff from other shifts							
4	Allocation	Allocate orders.		Allocation Manager	Order Intake Manager	AdvancePro	None (wait for IT DR completion)	PCs x 6	None (purchase replacements)	Warehouse Office (standard office space)	Corporate HQ	
				Allocation staff x 5	Staff from other shifts							
5	Routing	Route orders		Warehouse Operations Manager	Warehouse Operations Team Leader	AdvancePro	None (wait for IT DR completion)	PCs x 6	Re-purpose PCs from less-critical functions (to be defined)	Warehouse Office (standard office space)	Corporate HQ	
				Warehouse Operations Team Leader	Warehouse Operations Manager	Roadnet	Print standard routes (60-70% accuracy) Explore cloud-based alternative					
				Routing staff x 3 (1 minimum)	Staff from other shifts							
6	Palletization	Warehouse loadsheet and pallet control.		Warehouse Operations Manager	Warehouse Operations Team Leader	AdvancePro	None (wait for IT DR completion)	PCs x 2	Re-purpose PCs from less-critical functions (to be defined)	Warehouse Office (standard office space)	Corporate HQ	
				Warehouse Operations Team Leader	Warehouse Operations Manager			Printers	Alternate printer in Corporate HQ			
				Palletization staff x 3 (1 minimum)	Staff from other shifts							
7	Warehouse Picking Process	Select pallets for delivery		Warehouse Operations Manager	Warehouse Operations Team Leader	AdvancePro	None (wait for IT DR completion)	PCs x 2	Re-purpose PCs from less-critical functions (to be defined)	Warehouse Office (standard office space)	Corporate HQ	

# Revenue process technology improvement plan

For each processed identified in the business impact assessment above, each identified IT technology owner will meet with business owners and perform a technology improvement assessment and recommendation.

Technology	IT Technology Owner	Current State Assessment	Future State	Gap	Recommendation



Adapting our CXM strategy for COVID-19 begins with a clear, concise, and shared understanding of what our approach has historically entailed.

Once our existing strategy has been reviewed (or codified), it can be systematically assessed to highlight what will need to change based on customer, market, and resource shifts due to the impact of the virus.

## IT leaders must schedule a detailed review of the CXM strategy with their business counterparts to get everyone on the same page.

- A strong customer experience management strategy is a shared framework between the business and IT that outlines how the organization will deliver great customer experiences, the core marketing, sales, and customer service processes required to do so, and the technology ecosystem and roadmap for enabling these processes.
- A strong customer experience management strategy encompasses several elements:
  - A breakdown of key **customer personas**: Who are we targeting? What are their needs, wants, and behavioral traits?
  - The key **customer journeys** we need to support across marketing, sales, and service.
  - A **channel matrix** outlining the blend of channels we'll use for customer engagement.
  - **Strategic business and IT drivers** for CXM.
  - The top-level **technology architecture** that IT will build to support CXM.
  - A living, frequently updated **CXM roadmap** of business and technology initiatives.



Based on Info-Tech's [comprehensive blueprint](#) on building a CXM strategy.

# Focus on the Real End Customer: Adapting our CXM strategy to the COVID-19 crisis

Use [Info-Tech's CXM Methodology](#) to quickly adapt our approach.



## Phase Steps

### 1. Assess the Impact of COVID-19 on Your CXM Strategy

1. Review & Refresh Your CXM Strategy
2. Enumerate CXM Strengths to Leverage During the Crisis
3. Identify CXM Weaknesses Susceptible to COVID-19 & Create a Mitigation Register

### 2. Blunt the Damage of COVID-19 With New CXM Tactics

1. Protect Revenue With Focused Service of High-Value, Repeat Customers
2. Ruthlessly Prioritize Prospect Segments for Acquisition
3. Deploy Alternate Delivery Models to Ensure Continuity
4. Align Incentives to Crisis-Centric Customer Needs
5. Constrain Service Costs With Call Deflection

## Phase Outcomes

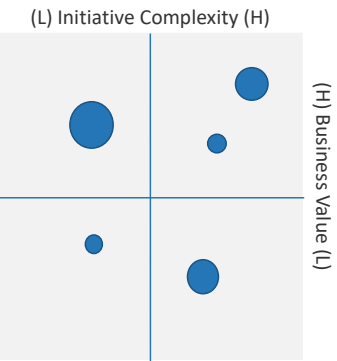
Create a consolidated, updated view of your current customer experience management strategy and identify which elements can be capitalized on to dampen the impact of COVID-19 and which elements are vulnerabilities that the pandemic may threaten to exacerbate.

Create a roadmap of business and technology initiatives through the lens of customer experience management that can be used to help your organization protect its revenue, maintain customer engagement, and enhance its brand integrity.

# Create a COVID-19 response roadmap for CXM

1. As a team, identify and list critical CXM initiatives or tactics that need to be addressed as part of the COVID-19 response plan. Categorize them into:
  - a) Process initiatives
  - b) Technology initiatives
  - c) Resourcing initiatives
2. Plot the initiatives on the complexity-value matrix to determine priority.
3. Identify quick wins: initiatives that can realize quick benefits with little effort. **Translate these into an order of operations – a week-by-week roadmap that extends no longer than six months.**

Example: Importance-Capability Matrix



The size of each plotted initiative must indicate the effort to complete.

Top-Right Quadrant	Strategic Projects
Top-Left Quadrant	Quick Wins
Bottom-Right Quadrant	Risky Bets
Bottom-Left Quadrant	Discretionary Projects

Input	Output
<ul style="list-style-type: none"><li>Existing CXM strategy</li><li>Existing CXM roadmap</li><li>Process maps for Marketing, Sales, and Customer Service (if available)</li></ul>	<ul style="list-style-type: none"><li>Prioritized roadmap of near-term CXM tactics and initiatives</li></ul>
Materials	Participants
<ul style="list-style-type: none"><li>Teleconferencing tools</li><li>Virtual whiteboarding software (if available)</li></ul>	<ul style="list-style-type: none"><li>IT Leader(s) (CIO/IT Director)</li><li>CXM Leader(s) – Marketing, Sales, Customer Service, and/or Public Relations VPs or Directors</li><li>IT and CXM Designates as needed (Business Analysts, Enterprise Architects, Sales/Marketing/Service Managers)</li></ul>

# 5. Protect Core IT Operations & Processes



IT Owner: Jane Ivanov, Director  
IT Service Desk

We've spent years hardening our core services. As much as possible, don't skirt current processes. Keeping things running smooth will require attention to core service delivery.

## Currently

- We need to meet our new budget goals while preserving our core capabilities and strategic priorities. Our job is to provide a framework for responding to any crisis. The framework must protect core operations processes to enable the business to continue delivering extraordinary value during this extraordinary circumstance.
- To do this, we have:
  - Obtained Info-Tech's Management & Governance Framework to use as a reference guide when identifying at-risk areas
  - Alerted the business that we will be communicating at-risk IT services in the coming days
  - Drafted targeted communications outlining the risks of these processes failing

## Next Steps

1. Management and Governance Assessment:
  - a) Identify critical core IT operations and processes that will need bolstering due to the pandemic based on Info-Tech's Management & Governance Framework.
  - b) Each VP responsible for these areas will perform a process assessment to identify necessary changes to pandemic-critical processes. They will submit their assessments with recommendations for change to the IT Pandemic Team Leader.
2. Service Interruption:
  - a) In addition, the Service Desk Manager will monitor and identify underlying system and process problems via analyzing service desk tickets based on reoccurring tickets.
  - b) The Service Desk Manager will provide the IT Pandemic Team Leader with weekly assessments highlighting core operations and processes failures.
  - c) The Crisis Communications Team Lead and the Operations Team Lead will communicate how specific business units will benefit from protecting their at-risk processes.
3. The IT Pandemic Team Lead bring these change requests to the Emergency Governance Committee for approval.

# Systematically identify “at risk” IT operations core processes

Leverage Info-Tech’s Management & Governance Framework and Business Impact Tool to identify at-risk processes.



## Proactively Identified At-Risk IT Processes

IT Process	IT Process Owner	Current State Assessment	Future State	Gap	Recommendation

# Reactively identify “at risk” IT operations core processes using service deck tickets

Leverage Info-Tech’s [Service Desk Ticket Assessment](#) & [Business Impact Tool](#) to reactively identify further at-risk processes.

Downloads

 Ticket and Call Quality Assessment Tool

 Preview



DRP Business Impact Analysis Tool

Estimate the impact of downtime to determine appropriate, acceptable recovery time objectives (RTOs) and recovery point objectives (RPOs), and review gaps between objectives and actuals. Specifically, this tool enables you to:

- Identify critical applications/systems.
- Identify dependencies.
- Define objective scoring criteria to evaluate the impact of application/system downtime.
- Determine the impact of downtime and establish criticality tiers.
- Set recovery objectives (RTO/RPO) based on the impact of downtime.
- Record recovery actuals (RTA/RPA) and identify any gaps between objectives and actuals.
- Identify dependencies that regularly fail, and have a significant impact when they fail, to prioritize efforts to improve resiliency.

This tool requires Excel 2013 or 2016 with the following components for the complete user experience:

- Power Query (Excel 2013 add-on) or Get & Transform (Excel 2016 standard feature).
- Power Pivot (Excel 2013/2016 add-on).

To enable Power Query (Excel 2013 only) and Power Pivot for the first time, go to File > Options > Add-ins > Manage COM Add-ins and check the appropriate boxes. You may require support from your IT department to enable these features.

If you are unable to run Excel 2016 or 2013 with the appropriate add-ons, you can download and use the legacy version of the tool on this page. Although the legacy tool can be used in lieu of the current version, **note that the legacy version is no longer supported.**

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 DRP Business Impact Analysis Tool

 Legacy DRP Business Impact Analysis Tool

 Preview

 Preview

## Reactively Identified At-Risk IT Processes

IT Process	IT Process Owner	Current State Assessment	Future State	Gap	Recommendation
Change Management	Sandi				



# Compile both proactive and reactive change requests for Emergency Governance Committee approval

A combined list of all process change requests will be submitted to the Emergency Governance Committee for approval.

Proactively and Reactively Identified IT Process Change Requests					
IT Processes	IT Process Owner	Current State Assessment	Future State	Gap	Recommendation
Service Desk	Jane Ivanov	Under Capacity – Level 2 technicians	Full Capacity – Level 2 technician	2 FTE	Escalate rapid redeployment from development for level 2 support

## 6. Capitalize on Emergency Business Process Innovations



IT Owner: Lisa Arlene, IT  
Applications Lead

Social distancing will create challenges and opportunities; being able to capitalize on emergency process alternatives will provide the business with long-term value, cost savings, and potential future revenue.

### Currently

- Social distancing is new: many processes will have to adapt to survive WFH and new on-the-job protocols. Our job is to identify process failures, mitigate those failures, and determine which of these process changes can have a long-term positive impact
- To do this, we have:
  - Obtained Info-Tech's *Business Impact Assessment Tool*
  - Validated our understanding of corporate priorities during the pandemic
  - Contacted stakeholders or SMEs to ask them to contribute to process analysis and adjustments led by IT

### Next Steps

1. The VP of IT Operations Team Lead will execute a business impact assessment using Info-Tech's BIA tool and process. Interviews with business process owners will be required, as will on-the-job process inspections.
2. The CIO and Operations Team Lead will perform a qualitative and quantitative analysis to determine how the processes are inhibiting business goals during the pandemic.
3. They will make educated assumptions on where process inefficiencies exist and validate root causes with key stakeholders.
4. Together they will design the innovative future process around worker safety and customer engagement.
5. The Communications Team Lead along with the IT Operations Team Lead will communicate the updated process with the organization and share the reasoning behind the changes. Messaging should focus on the benefits to each relevant business unit.
6. The combined teams will determine if business process innovations have potential long-term business benefits.

# Systematically identify business process innovations

Leverage Business Impact Tool and BPI Playbook to identify business process innovations.

All Research / Infrastructure & Operations / Operations / DR and Business Continuity

 **DRP Business Impact Analysis Tool**

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- Determine the impact of downtime and establish criticality tiers.
- Set recovery objectives (RTO/RPO) based on the impact of downtime.
- Record recovery actuals (RTA/RPA) and identify any gaps between objectives and actuals.
- Identify dependencies that regularly fail, and have a significant impact when they fail, to prioritize efforts to improve resiliency.

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DRP Business Impact Analysis Tool

Legacy DRP Business Impact Analysis Tool

Q Preview

Q Preview



Create a Winning BPI Playbook

Don't waste your time focusing on the "as is." Focus on the improvements and the "to be."

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## Business Process Innovation Change Requests

Business Process	Process Owner	Current State Assessment	Future State	Gap	Recommendation

# 7. Re-Prioritizing Project Backlog: Keep Key Projects Moving Forward



IT Owner: Suzanne Valente, VP  
IT Operations

Some projects should be halted, some scaled back, some pushed forward, and others started. We will determine which is which.

## Currently

- Our job is to reorder the project backlog for better alignment with strategic goals. Remember, we are not just going to cancel low-priority projects, we will be re-assessing the scope and scale of projects that could be retained in our portfolio. Ultimately, we want to reduce spend, but not at the expense of innovation and always with a view toward competitive advantage coming out of a potential economic downturn.
- To do this, we have:
  - Documented projects in backlog
  - Documented how projects in the backlog contribute to business goals (pre-pandemic)
  - Ensured that backlog reprioritization working group aligned on business goals during the pandemic
  - Level-set on the criteria for the backlog priority scorecard
  - Templated communications to stakeholders for reprioritized projects

## Next Steps

1. The Application Team Lead will facilitate a Pandemic Backlog Adjustment Session.
2. The Applications Team Lead will conduct the project backlog cleanse with appropriate executives and IT leaders. Key department heads or SMEs will be included because this session may incur some pushback.
3. The Applications Team Lead along with department heads will build a backlog grooming scorecard and establish a definition or “project value” and score/rank backlog items in relation to their value during this pandemic.
4. The Crisis Communications Lead and Applications Team Lead will send targeted communications informing stakeholders of changes to the backlog that impact their projects. They will also share the reasoning for the reprioritization and provide an opportunity to contact the decision maker.

# Due to the pandemic, re-assess the scope and scale of projects in the backlog

## Tame the Project Backlog

Take charge of your backlog of unstarted projects.

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## Re-prioritize our project backlog to free up resources for pandemic initiatives

We will treat our project backlog like an investment: if we are going to put time and money into keeping a project going, we will ensure that we are investing wisely.

Some projects may be paused; others outright canceled. And alternative projects may be proposed that have higher immediate value due to the COVID-19 pandemic.

Rationalizing our project backlog is essential to providing value to our business. However, we must also be sure to maintain as many in-flight projects as possible; cancel only with the Emergency Governance Committee's approval.

## 8. Review & Revise Security Priorities in a Pandemic



IT Owner: Jerry Steward,  
Director IT Security

Hackers love a crisis. Be prepared to secure and privatize our new environments in the face of new threats.

### Currently

- Even though our priorities are shifting during the pandemic, now is not the time to put our security strategy on the backburner. We have to be proactive about closing new security gaps that are the result of process changes. Let's also prepare to address the vulnerabilities brought on by a remote workforce.
- To do this, we have:
  - Built an information security strategy
  - Determined the organization's risk tolerance
  - Understood new pandemic-specific business objectives
  - Uncovered vulnerabilities based on new processes, social distancing, and remote work
  - Identified resources required to deescalate the new vulnerabilities
  - Reprioritized existing policies in the security strategy to streamline digital defence efforts during the pandemic
  - Created security training content for remote workers

### Next Steps

1. The Security Monitoring Team will assess new information security requirements based on new pandemic-specific business goals.
2. The team will brainstorm where there are gaps in the existing security strategy. Identify how to fill those gaps and what resources are required.
3. Prioritize existing security policies based on the new gaps in the security strategy.
4. Reprioritize security policies to ensure protection for the business and its employees during the pandemic.
3. The Security Monitoring Team and Crisis Communication Team will present security as a personal and individualized issue for employees that are new to remote work.
4. You can make this new personal focus a driver for your organizational security awareness and training program.



# Clearly prioritize our pandemic-specific security risks by reviewing our information security strategy

## Reviewing our security strategy is a top priority.

Through this process, a comprehensive current state assessment, gap analysis, and initiative generation ensures that nothing is left off the table.

This project will elevate the perception of the security team from being a hindrance to the organization to an enabler.

### Build an Information Security Strategy

Tailor best practices to effectively manage information security.

Info-Tech Research Group, Inc. is a global leader in providing IT research and advice. Info-Tech's products and services combine extensive insight and research advice with ready-to-use tools and templates that cover the full spectrum of IT concerns.

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### It's not a matter of *if* you have a security incident, but *when*

ORGANIZATIONS NEED TO EXPECT THE INEVITABLE SECURITY BREACH.

90%

of businesses have experienced an external threat in the last year.<sup>1</sup>

50%

of IT professionals consider security to be their number one priority.<sup>1</sup>

53%

of organizations claimed to have experienced an insider attack in the previous 12 months.<sup>2</sup>

46%

of businesses believe the frequency of attacks is **increasing**.<sup>1</sup>

Effective IT leaders approach their security strategy from an understanding that attacks on their organization will occur. Building a strategy around this assumption allows your security team to understand the gaps in your current approach and become proactive vs. reactive.

Sources: "Kaspersky Lab, 'Global IT Security Risks Survey'; 'GA Technologies, '2018 Insider Threat Report'.

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### 1.2 Security pressure level descriptions

Organizations with medium security pressure are usually attractive to cyberattackers for financial reasons, and they have security demands from compliance or customer sources.

These organizations require strong security risk controls and assurance in terms to repel attackers and meet compliance demands.

They usually have a medium risk tolerance and will refer to foundational best practice frameworks for guidance.

Organizations with high security pressure are highly attractive to cyberattackers and have customers, business stakeholders, and regulators demanding strong security controls. These organizations require very strong security risk governance and management.

These organizations often claim to have a low tolerance for risk, but in practice will implicitly accept risks that they would not deliberately approve. Gaining support to transition from moderate to low tolerance is a challenge.

Organizations with low security pressure are either less attractive to cyberattackers, or are mostly free of pressure from compliance agencies or customer/business demands.

These organizations generally have a high risk tolerance. However, this does not necessarily mean they are more comfortable with risk. They may be unable to afford the right technologies, or stakeholders would prefer to invest in the business rather than security.

Organizations with a very high security pressure are exceptionally attractive to cyberattackers for financial, IP, or political reasons. They have customers, business stakeholders, and regulators demanding strong security controls. These organizations require very strong security governance and management.

These organizations also tend to have highly mature security programs and a low risk tolerance that is generally well understood and adhered to.

The final output of your security pressure is a cursory indicator of the required maturity level of your security program. If your organization is under low pressure, you don't need a mature security program and vice versa for high pressure. Use this information to guide your target state definition in step 2.2 of this project.

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### 2.1 Info-Tech's information security framework and maturity model methodology

Info-Tech's comprehensive framework begins by defining security strategy based on seven security components and related subcomponents.

Information Security Framework

Governance

Context and Leadership

Information Security Charter

Information Security Organizational Structure

Culture and Awareness

Evaluation and Direction

Security Risk Management

Security Policies

Security Strategy and Communication

Compliance, Audit and Review

Security Compliance Management

Internal Security Audit

External Security Audit

Management Review of Security

Prevention

Identity Security

Identity and Access Management

Data Security

Hardware Asset Management

Data Security & Privacy

Infrastructure Security

Network Security

Endpoint Security

Malicious Code

Application Security

Vulnerability Management

Cryptography Management

Physical Security

Cloud Security

HR Security

HR Security

Change and Support

Configuration and Change Management

Vendor Management

Detection

Security Threat Detection

Log and Event Management

Response and Recovery

Security Incident Management

Information Security in BCM

Security eDiscovery and Forensics

Backup and Recovery

Measurement

Metrics Program

Continuous Improvement

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# Secure remote workers

As the COVID-19 outbreak has increasingly required employees to work remotely or from home, IT security professionals are certainly thinking about how new remote work policies expand the attack surface of unprotected home networks. Our organization has made remote work mandatory; our IT security team must develop a checklist for remote employees to improve their overall security settings while working from home.

Home networks are often insecure because wireless routers and modems focus on ease of use right out of the box, but most modern routers come with more granular security controls that are turned off by default. People with older wireless routers may also be set up with less-secure configurations.

Our IT security team must assist those working remotely so they can help make home networks and remote work more secure. The team must determine the best strategy for using a security checklist to adequately protect our organization.



## *Checklist for Securing Remote Workers*

Use the checklist tool along with the instructions on the next slide to help secure your remote workers

# Checklist for securing remote workers

30 minutes to 1 hour

1. As a group, decide on why you are sending out the Checklist for Securing Remote Workers:
  - a) Are you sending it out as a recommendation?
  - b) Are you sending it out so that users can return it to you?
  - c) Are you sending it out for compliance reasons?
2. Review the various security checklist items, rationale, and instructions.
  - a) Identify any items that you would like to add or delete if an item matches an already existing process.
  - b) Review the rationale and instructions and decide if there is any useful information to provide to users that is specific to your organization's internal security culture.
3. If users must return the checklist, record the number of completed checklists and compare to number of users working remotely.



Download the *Checklist for Securing Remote Workers*

Input	Output
<ul style="list-style-type: none"><li>• List of prioritized security checklist items</li><li>• List of rationale</li><li>• List of instructions for each security control</li></ul>	<ul style="list-style-type: none"><li>• Checklist for Securing Remote Workers</li></ul>
Materials	Participants
<ul style="list-style-type: none"><li>• <i>Checklist for Securing Remote Workers</i></li><li>• List of remote users</li></ul>	<ul style="list-style-type: none"><li>• IT Security Manager</li><li>• Security Analyst</li><li>• CISO</li><li>• CIO</li></ul>

# 9. Prepare for the Economic Downturn



IT Owner: Suzanne Valente, VP  
IT Operations

Cutbacks are on their way. We are already being asked to do more with less. It is time to start planning for cost cutting and recession-proofing.

## Currently

- Our current budget will not survive this economic downturn. Our CFO has asked that we start looking into cost-cutting measures that can be enacted quickly. Finalized budget-cut numbers will be published within the month.
- To do this, we have:
  - Engaged Info-Tech on a series of cost-cutting analyst advisory calls to help determine where we can lower our expenses.
  - Asked for a focus on non-employee-based cost cutting.
  - Followed Info-Tech's initial advice of separating cost cutting into three stages: reactive, proactive, and strategic reduction measures.

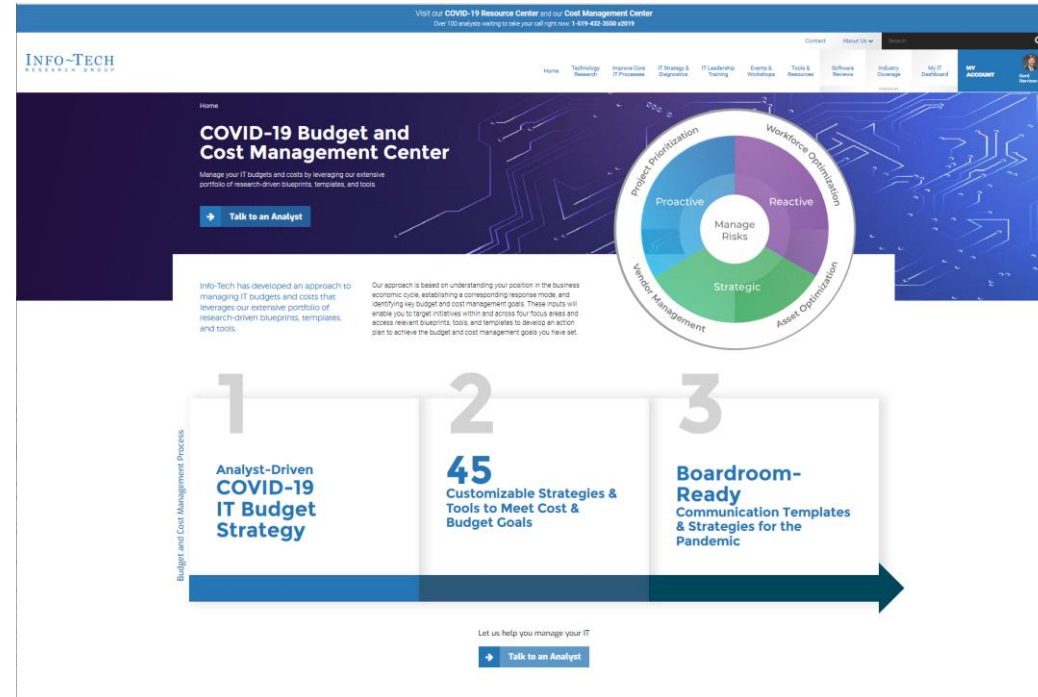
## Next Steps

1. Our VP of IT Operations will begin examining reactive, proactive, and strategic cost cutting measures.
2. Using Info-Tech's COVID-19 Budget and Cost Management Center, we will develop a new IT budget presentation for the CFO.

# We will reduce IT costs using industry-accepted cost-cutting principles

During the pandemic, we will focus cost cutting on vendor contracts, project reallocation, and delayed upgrades.

We believe most of our cost-cutting objectives can be accomplished without job loss in our IT department. We will engage Info-Tech's [COVID-19 Budget and Cost Management Center](#) to help us properly allocate spend in our department.



A methodical, industry-proven approach reduces risk.

### Analyst-Driven COVID-19 IT Budget Strategy

**Identify Business Cycle Position**

Identify the business cycle position of your organization. The business cycle is a series of peaks and troughs that repeat over time. The current cycle is the longest in history, and it is still ongoing. The current cycle is the longest in history, and it is still ongoing.

**Define Budget & Cost Object, KPIs**

Define the budget and cost object, KPIs. The budget is a financial plan that outlines the expected revenue and expenses for a given period. The cost object is the specific item or service that is being measured. KPIs are metrics that are used to track performance over time.

**Results (12 months)**

Results (12 months): The budget was achieved, and the cost object was within budget. The KPIs were met, and the overall performance was excellent.

**Business Cycle and Corresponding Response Mode**

## 45 Customizable Strategies & Tools to Meet Cost & Budget Goals

Executive Summary | Key Takeaways | Strategic Initiatives

**Focus Area Activities**

	11 Workforce Optimization Strategies +	12 Asset Management Optimization Strategies +	10 Vendor Management Strategies +	10 Project Prioritization Strategies +
<b>Workforce</b>	<p>Optimize workforce planning and talent acquisition strategies.</p> <p>Implement flexible workforce models.</p> <p>Invest in workforce development and training.</p> <p>Optimize compensation and benefits structures.</p> <p>Enhance employee engagement and retention.</p>	<p>Optimize asset lifecycle management.</p> <p>Implement predictive maintenance strategies.</p> <p>Optimize fleet management and logistics.</p> <p>Enhance asset utilization and productivity.</p> <p>Implement asset tracking and monitoring.</p>	<p>Optimize vendor selection and onboarding.</p> <p>Implement vendor performance management.</p> <p>Optimize vendor payment terms and conditions.</p> <p>Enhance vendor communication and collaboration.</p> <p>Implement vendor risk management.</p>	<p>Optimize project selection and prioritization.</p> <p>Implement project portfolio management.</p> <p>Optimize project resource allocation.</p> <p>Enhance project communication and reporting.</p> <p>Implement project risk management.</p>
<b>Technology</b>	<p>Optimize IT infrastructure and cloud migration.</p> <p>Implement data analytics and business intelligence.</p> <p>Optimize cybersecurity and risk management.</p> <p>Enhance IT service management and support.</p> <p>Implement digital transformation initiatives.</p>	<p>Optimize IT infrastructure and cloud migration.</p> <p>Implement data analytics and business intelligence.</p> <p>Optimize cybersecurity and risk management.</p> <p>Enhance IT service management and support.</p> <p>Implement digital transformation initiatives.</p>	<p>Optimize IT infrastructure and cloud migration.</p> <p>Implement data analytics and business intelligence.</p> <p>Optimize cybersecurity and risk management.</p> <p>Enhance IT service management and support.</p> <p>Implement digital transformation initiatives.</p>	<p>Optimize IT infrastructure and cloud migration.</p> <p>Implement data analytics and business intelligence.</p> <p>Optimize cybersecurity and risk management.</p> <p>Enhance IT service management and support.</p> <p>Implement digital transformation initiatives.</p>
<b>Finance</b>	<p>Optimize financial reporting and budgeting.</p> <p>Implement cost management and control.</p> <p>Optimize capital management and investment.</p> <p>Enhance financial transparency and accountability.</p> <p>Implement financial risk management.</p>	<p>Optimize financial reporting and budgeting.</p> <p>Implement cost management and control.</p> <p>Optimize capital management and investment.</p> <p>Enhance financial transparency and accountability.</p> <p>Implement financial risk management.</p>	<p>Optimize financial reporting and budgeting.</p> <p>Implement cost management and control.</p> <p>Optimize capital management and investment.</p> <p>Enhance financial transparency and accountability.</p> <p>Implement financial risk management.</p>	<p>Optimize financial reporting and budgeting.</p> <p>Implement cost management and control.</p> <p>Optimize capital management and investment.</p> <p>Enhance financial transparency and accountability.</p> <p>Implement financial risk management.</p>

## Boardroom-Ready Communication Templates & Strategies for the Pandemic

**Present the situation**

Present the situation: The pandemic has caused significant disruption to the global economy and has led to a sharp decline in demand for many products and services. This has resulted in a significant loss of revenue and a corresponding increase in expenses.

**Develop an action plan**

Develop an action plan: The first step is to assess the current situation and identify the key areas of concern. This includes reviewing the financial statements, understanding the impact of the pandemic on the business, and identifying the key risks and opportunities. The next step is to develop a plan of action that addresses these issues and outlines the steps that need to be taken to get the business back on track.

**Build a communication plan**

Build a communication plan: The next step is to develop a communication plan that outlines the key messages and the channels that will be used to communicate with the board and other stakeholders. This includes identifying the key messages, determining the frequency and timing of communications, and selecting the appropriate channels for each message. The plan should also include a process for monitoring and evaluating the effectiveness of the communications.

Start Your Action Plan



# 10. Execute Our IT Pandemic Strategy

It's time to turn strategy into tactics. Let's treat this pandemic like a project. Below is a timeline summary of these strategic pandemic initiatives and a more future-oriented look at where we will go in the months to come.

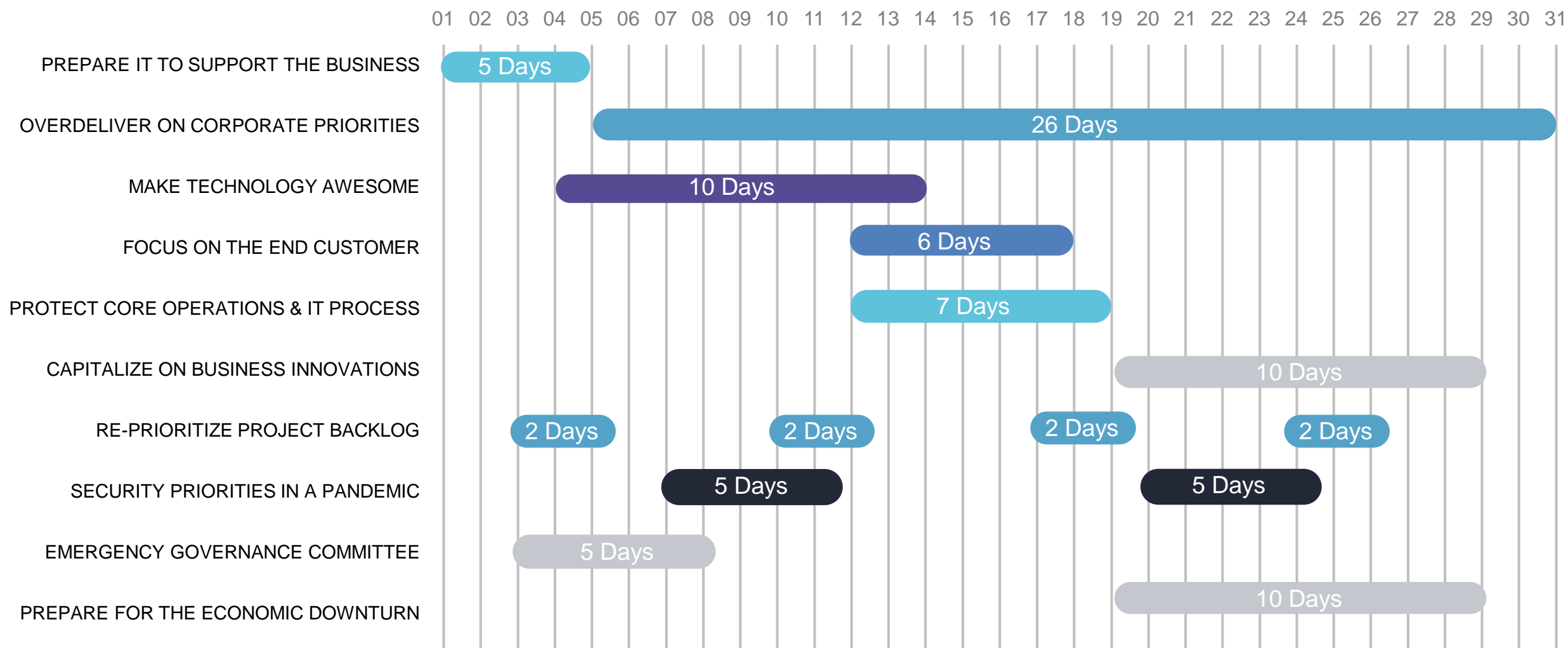
## Currently

- We have assigned arbitrary timelines to each initiative. Each needs to be refined and sized so we have a collaborative, holistic view of the implementation of the strategy.
- To do this, we have:
  - Discussed each of the initiatives with relevant IT managers.
  - Received t-shirt sized estimates of each initiative.
  - Produced both Gantt and Sunrise diagrams to capture the probable progression of this plan.

## Next Steps

1. The IT Pandemic Response Team Leader will ask for regular updates against each of these initiatives.
2. Each IT leader will functionally decompose each initiative to arrive at more-accurate estimates for each initiative. Send these back to the Team Leader for updating into the plan.
3. A central version of the plan will be stored in our knowledgebase located [here \(insert link\)](#).
4. As events unfold over the coming months, we will revise these initiatives and update the plan and the Sunrise diagram.
5. We will begin to prepare the “long-tail” initiatives that will bring our company back to the “new” normal mode of operation.

# One-Month Pandemic Strategy Timeline



# Long-Term Pandemic IT Initiative Overview

