Refocusing and Aligning after Executive Transition
A Partnering Resources Case Study

The new Chief Information Officer entered an organization full of contradictions. The IT staff had a positive self-image yet the culture bred harmful behaviors like gossip and intense politicking. The organization consisted of smart, capable employees, but they relied on leaders to make almost every major decision. People resisted structure and process, yet were deeply invested in the organizational hierarchy and competed to gain exposure to higher levels of authority. The organization was drowning in information, but didn't know what data was truly important to the customer or to their own processes. Most alarming were customer relationships: while some customers were happy, many struggled with inconsistent service, quality, and responsiveness. The new CIO needed to get the organization aligned and boost performance quickly.

Response

In an organization in which everyone had an opinion, the first step was to build a common view of the challenges, strengths, and needs of the organization. Given the love-hate relationship with authority, staff and customers probably would have followed strong, initial direction from the CIO—but it wouldn't last. To build deeper trust and long-term, positive working relationships, the CIO chose a participative approach.

The work began with learning and listening. The leadership team scheduled 1:1 meetings with key customers to find out where their businesses were going, what challenges they faced, and what they hoped IT could do for them. Managers reviewed six of the most important studies conducted on the organization—and there were many studies to choose from—to identify themes and critical challenges, and to make recommendations. Staff convened to frankly discuss the strengths of the organization and the barriers to their work. Finally, the new CIO met with all of her customers to listen to their needs.

The information was integrated and, after validating it, the IT organization got aligned. Staff created their mission, vision, strategic priorities, and values, which all received support from staff and customers. Then they laid out their operational plans. This work was difficult since it required representation from across the institution and from every division within IT. But it worked: the resulting operational plan integrated siloed activities; set concrete, measurable goals; articulated the end-state vision for every project from a business perspective; and created concrete plans to deliver what the customers really needed.

Results

The IT organization has made significant progress and built on the strong initial foundation created through its internal alignment initiative. For example, a high-powered, IT-business governance board now meets monthly to oversee the project portfolio, make decisions, and manage competing priorities. Specific areas have begun process improvement efforts and arthritic systems have been retired. Although not without challenges, the organization now has energy, enthusiasm, momentum, and a commitment to continuing its improvement journey as a team—with each other and with their clients.

Client Profile

Industry
Education

Division
Information Technology

Staffing
300 employees

Key Responsibilities
- Keep IT running
- Deliver reliable, cost-effective, evolving services
- Support cost-effective research computing
- Help the institution make sense of its data

Strategic Goal
Refocus and align an organization after an executive transition

Critical Success Factors
- Broad and deep engagement at leader, manager, and staff levels
- Core purpose and values identification
- Strategic and operational planning
- Cascading goals
- IT – business alignment