

# Review, analyze, plan

## How to conduct a year-end review of your business technology performance

Many business owners see their IT budgets increasing, while also perceiving that the level of service doesn't keep pace. Or, they may feel out of their depth, dealing with something that seems very unpredictable.

Technology has become so pervasive, however, it has become business. Business owners neglect technology investments at their own peril.

As you plan for 2017, and your upcoming technology needs, you should conduct an end-of-year review of your current business technology performance, says Paul Sems, general manager at Blue Technologies. This provides context, so you won't feel so unsure when developing your future technology road map.

*Smart Business* spoke with Sems about how to review your company's technology performance.

### How exactly should companies review their technology performance?

#### Step 1: Alignment

Many businesses leaders feel their business goals are unsupported by IT. That shouldn't be the case. Start by asking things like:

- Why are we investing in IT and what are the business outcomes that we expect?
- Does IT leadership and the IT team clearly understand their purpose?
- Is their primary purpose to help increase revenue? Is it to reduce cost? Is it to improve customer relationships? Is it to streamline operations?

The work it takes to answer important questions like these helps ensure that there is a clear understanding of IT's mandate from the board of directors, business owner and/or CEO.

This step in the process allows your organization to have a clear line of sight

at how your IT investments and business goals connect. As you begin to understand how your IT investments should impact your business goals, you'll want to prioritize these and clearly communicate them, so you can later measure the direct relationship between IT and productivity with the help of your technology vendors.

#### Step 2: Voice of the (internal) customer

IT's customers are the business process owners in the firm. As these business process owners move toward their business objectives, IT needs to make sure that it is open to listening to feedback to ensure that it is prioritizing projects properly. IT needs to fully understand the services they offer their clients (business process owners) and understand which services are providing the most business value.

When the interaction between IT and other employees isn't strong, it's time to build relationships and clearly define roles.

It's important for IT to get specific facts from these stakeholders, or business process owners. Where is technology helping? Where are the biggest roadblocks for achieving business goals and top priorities?

#### Step 3: Self reflection

With step one, you start to develop and understand the big picture and why you are investing in IT. With step two, you can paint



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the background of the big picture defined in step one. You understand where you are doing well and where you can invest further.

With the third step, you take a deeper dive into how well your organization's IT is equipped to meet your customer's needs.

One way to evaluate this is to review key processes that are fundamental to all IT organizations. There are about 45 elemental processes that should be reviewed and prioritized — and your technology adviser can help you go over these. For example, you might find that the IT governance isn't structured properly or there's a lack of alignment between IT and your business objectives.

#### What other steps do you recommend when reviewing technology performance?

Depending on the size and complexity of your organization, these steps may be enough to develop a clear roadmap for the next year. More complex organizations will need to spend additional time doing a deeper dive into the inner workings of the business.

In either case the result should clearly summarize the IT mandate, the voice of the business process owner and the top three to six areas of improvement for the next year. As with any strategic plan, then you'll just need to follow it and measure the results throughout the year to stay on track. ●