



## IT Governance Course – Syllabus

Course: IT Governance – A Best Practice Framework for Planning and Deployment for Competitive Advantage

### Seminar Description:

**“The Board of Directors is well aware of its role to oversee the company’s organizational strategies, structures, systems, staff, performance and standards. As President, it is my responsibility to ensure that they extend that oversight to the company’s IT as well, particularly with our growing reliance on IT for competitive advantage, we simply cannot afford to apply to our IT anything less than the level of commitment we apply to overall governance.”**

**Michael Cangemi, President and CEO, Etienne Aigner Group, Inc.**

The issues, opportunities and challenges of effectively governing an organization’s Information Technology (IT) demands and resources has become a major concern of the Board and executive management in enterprises on a global basis. Therefore, an integrated and comprehensive approach to the governance of IT and its resources is becoming critical to more effectively align, invest, measure, deploy and sustain the strategic and tactical direction and value proposition of IT in support of the business.

The seminar presents an integrated approach to IT governance by guiding the participant through a comprehensive IT Governance framework and roadmap and its major components, which addresses the following goals:

- Strategic alignment of IT with the business
- Responsible utilization of assets and resources
- Ensures that IT delivers on its plans and commitments
- Establishes and/or improves accountability of all constituents
- Manages risks and contingencies proactively
- Improves IT accountability, audit-ability, compliance, performance and maturity

The material leverages and integrates current and emerging industry best practices, standards, guidelines and leading company case studies.

### Fee:

\$495/person (group pricing is also available)

### Who Should Attend?

The seminar has been designed specifically for Executives (CXOs, VPs, Directors and/or Managers) involved with or responsible for directing, planning and implementing and sustaining an IT governance policy and process. It is intended to be a, “How to Seminar on IT Governance,” that is pragmatic, actionable and useable on Monday morning and takes you through a step by step approach to help transition an organization from its current state to a future state of a higher level of IT governance maturity and effectiveness.

The seminar has something for everyone who is or should be involved in the process – ranging from an Executive Overview of IT Governance to more detailed modules that address alignment, execution (e.g. Program/Project Management, IT Service Management and Delivery), performance management, risk management and mitigation, outsourcing, etc.).

**Duration:** 10 - 12 hour course (on-line) or a 3 Day Seminar

## Overview and Key Topics:

Information technology (IT) has become an integral part of a business and is fundamental to support, sustain and grow the business. We define IT Governance broadly as a collection of management, planning and performance reporting and review processes with associated decision rights, which establish controls and performance metrics over key IT investments, projects, delivery services and new or change request authorizations and compliance with regulations, laws and organizational policies.

The seminar covers a composite IT governance framework and roadmap for planning and implementing a successful IT governance process and drills down into its major components in more detail. Key topics covered are:

- Why IT governance? Driving forces and challenges; Executive View of IT governance; Who benefits and what are the value propositions?
- Overview of Industry Best Practice Standards, Model and Guidelines covering some aspect of IT governance – PMBOK, PMMM, CMMI, ITIL, Security, select ISO standards, COBIT, Prince2, others)
- IT Governance framework and roadmap; Key Governance Processes- Planning, Execution, Performance Management, Steering Groups, etc.
- Principles of Business/IT Alignment Excellence; Business and IT Plans, Investment/Portfolio Management Criteria; IT Engagement Model; Balanced Scorecard
- Principles of Program/Project Management Excellence; PM Life Cycle Phases and Templates; PM Metrics; PMO; Risk Management; Select SDLC frameworks
- Principles of IT Service Management and Delivery Excellence; ITIL (It Infrastructure Library) and its value; Metrics; Work Flows; Business Rules
- Principles of Vendor Management and Outsourcing Excellence: Vendor Selection, Negotiations and Management
- Lessons Learned and Critical Success factors
- Select Case Studies

The seminar is about IT Governance and presents IT Governance as a journey along an integrated roadmap and enables organizations to achieve higher levels of IT maturity and effectiveness. The seminar is:

- **Pragmatic** – leverages current and emerging best practices and case studies from leading organizations that work
- **Actionable** – since IT Governance represents a journey, there are many strategies and actions that can be implemented to demonstrate incremental improvements along the path
- **Easy to Use** – IT Governance is decomposed into its major components, each of which can be addressed in parallel and thus speed up the maturity process based on an Integrated IT Governance Framework and Roadmap (see example):

## Integrated IT Governance Framework and Roadmap

## Executive Summary

Identifies the major areas that must be addressed on the journey to a higher level of IT governance maturity and effectiveness

Areas of Work	Description/Components	Deliverables/ References
Business Plan/ Objectives (Demand Management & Alignment)	<ul style="list-style-type: none"> <li>Strategic Business Plan – Vision, Objectives, Financials, Operations, SWOT, Imperatives (Must Do's), Initiatives (Alternatives that Support Imperatives) etc.</li> <li>Capital Planning/Expense Planning &amp; Budgeting</li> <li>Business Performance Management (Key Metrics)</li> <li>Executive and Other Steering &amp; Review Councils; Organization Structure</li> </ul>	<ul style="list-style-type: none"> <li>Plan Document</li> <li>Financials</li> <li>Balanced Scorecard Metrics</li> <li>BCG; Porter; Hamel</li> </ul>
IT Plan, Objectives, Portfolio Investment and Approvals (Demand Management & Alignment)	<ul style="list-style-type: none"> <li>IT Plan is aligned with the Business Plan – IT Capital/Expense Budget</li> <li>IT portfolio investment, rationalization, selection, prioritization, funding and approval (Portfolio Management Model (for New, Change Programs and Projects and/or Operational and Infrastructure Functions)</li> <li>Manage risks and have contingency/disaster recovery plans</li> <li>IT Performance Management (Define Metrics and Measurement Criteria)</li> </ul>	<ul style="list-style-type: none"> <li>IT Strategic/Tactical Plan/Metrics</li> <li>Portfolio Mgt. Model (Investment Criteria); ITIM</li> <li>Engagement Model - Roles</li> <li>Business Rules &amp; Authorization</li> <li>McFarlan, Cash; Luftman; Popper; Selig</li> </ul>
IT Plan Execution & Delivery (Resource Management)	<ul style="list-style-type: none"> <li>Tactical, Project and Operating Plans (Capital Plans, Project Plans and Budgets)</li> <li>Policies, Standards, Guidelines &amp; Processes (e.g. Management Control, Enterprise Architecture, Security, PMO, ITIL, etc.)</li> <li>Processes ( PMO, Help Desk, Security, Administrative SOPs, Workflows, etc.)</li> <li>Financial, program, project, application, maintenance and operational accountability</li> </ul>	<ul style="list-style-type: none"> <li>Assess Implications of PMMM, PMBOK, CMMI, ITIL, SDLC, CoBit, Security (ISO 17799) Frameworks on Company's Processes</li> <li>Infrastructure &amp; Operational Integrity and Continuity</li> </ul>
Performance Management, Controls and Vendor Management	<ul style="list-style-type: none"> <li>Manage and measure plans, budgets programs, projects, operations</li> <li>Define and track key performance indicators (KPI)</li> <li>Compare plans to actuals and take appropriate corrective actions</li> <li>Outsourcing and Vendor Selection, Tracking, Measurement</li> </ul>	<ul style="list-style-type: none"> <li>Balanced Scorecard &amp; KPIs</li> <li>Performance Management</li> <li>RFI, RFQ, RFP and Contract Management</li> <li>Risk Management</li> </ul>
People Development & Continuous Process Improvement	<ul style="list-style-type: none"> <li>Human capital development</li> <li>Organizational, Project &amp; Operational Maturity Models and Standards</li> <li>Managing Change and Transformation (e.g. culture, interoperability)</li> <li>Training and Certification (e.g. Individual and Organization)</li> </ul>	<ul style="list-style-type: none"> <li>Adopt Current and Emerging Industry and Government Best Practices Standards &amp; Guidelines</li> <li>PCMM; OMB 300; ISO; ITIM</li> <li>Career Development and Certification</li> </ul>

### Learning Objectives:

- Understand the issues, challenges and growing importance of IT governance
- Be able to plan, develop, deploy and sustain an effective IT governance policy, process, techniques and tools
- Manage, evaluate, estimate, prioritize, fund, measure, assign and track requests for IT services more consistently and in alignment with the business
- Allocate IT resources to the highest business value add activities (e.g. portfolio investment management)
- Establish and/or improve IT decision rights, ownership and accountability
- Improve organizational performance, responsiveness, reliability, maturity and staff development
- Provide an overview of select current and emerging industry best practices and standards (e.g. BCG, ITIM, PMMM, PMBOK, CMMI, ITIL, COBIT, select ISO standards and others)
- Improve compliance and audit-ability

### Benefits:

- Apply the lessons learned to plan, manage, deploy and sustain an effective and robust IT Governance framework and its major components
- Be exposed to select current and emerging industry and government best practices and select case studies
- Sharpen and refine your knowledge and competencies
- Understand your role in the IT Governance process, regardless of whether you are a Board member, C level executive, manager or professional
- Help to achieve greater success in your work, regardless of whether you.....
  - Know a lot about IT Governance
  - Know very little about IT Governance
  - Are responsible for developing, enforcing and/or improving some aspect of IT Governance
- Develop a personal action plan for you and your organization to create proactive awareness and commitment to action

**Course Syllabus – IT Governance**

Module	Topics
0	Executive Summary <ul style="list-style-type: none"> <li>• Executive’s View of IT</li> <li>• Definition and Purpose of IT Governance</li> <li>• IT Governance Assessment Maturity Model</li> <li>• Integrated IT Governance Framework and Roadmap</li> <li>• Key Governance Roles, Responsibilities and Accountability</li> <li>• IT Governance Decision Rights</li> <li>• Demand Management</li> <li>• Balanced Score Card for Business and IT</li> <li>• Prerequisites for Creating a Successful IT Governance Program</li> <li>• Future State of IT Governance – A Blueprint Concept</li> </ul>
1	Foundations of IT Governance <ul style="list-style-type: none"> <li>• Why Do Organizations Need an IT/Business Governance Policy and Process</li> <li>• Value propositions from Best-in-Class Companies on Governance</li> <li>• Key IT Resources and Functions to be Managed</li> <li>• Three Critical Pillars of IT Governance – Organization/People, Process and Technology</li> <li>• Results of Ineffective IT Governance</li> <li>• Steps in Making IT Governance Real</li> <li>• A Generic Governance Process Improvement Model</li> <li>• A First Step – Understand Current Maturity of IT Governance</li> </ul>
2	Integrated IT Governance Framework and Roadmap <ul style="list-style-type: none"> <li>• Benefits of Using an Integrated IT Governance Framework</li> <li>• Integrated IT Governance Framework and Roadmap</li> <li>• Select Examples of Current and Emerging Business/IT Strategy and Governance Best Practice Reference Models, Frameworks and Standards</li> </ul>
3	Business/IT Alignment Excellence <ul style="list-style-type: none"> <li>• The Board’s Role in Driving Business/ IT Alignment</li> <li>• Principles of Aligning IT to the Business More Effectively</li> <li>• Business and IT Plan Integration Flow</li> <li>• Business and IT Strategy Development Framework and Outline</li> <li>• IT/Business Alignment &amp; Portfolio Management Triangle</li> <li>• The Five Stages of IT Investment (Portfolio) Management Maturity</li> <li>• IT Engagement (Relationship) Model</li> </ul>
4	Program/Project Management (PM) Excellence <ul style="list-style-type: none"> <li>• Value Propositions of PM from Leading Organizations</li> <li>• Principle for Achieving Excellence in Program/Project Management</li> <li>• PM Maturity Model</li> <li>• Linking IT/Business Plans to PM and Beyond</li> <li>• PM Life Cycle Phases, Components and Key Templates</li> <li>• IT Demand Management Gate Process Flow and Select Decision Criteria</li> <li>• Fast Track versus Complex PM Initiatives (Scalable and Flexible Process)</li> <li>• PM Governance and Escalation Framework</li> <li>• PM Key Metrics – Mandatory and Discretionary</li> <li>• The Roles of the Program Management Office (PMO)</li> </ul>
5	IT Service Management and Delivery (ITSMD) Excellence <ul style="list-style-type: none"> <li>• Principles for Achieving IT Service Management and Delivery Excellence</li> <li>• Benefits of IT Service Management and Delivery</li> <li>• What is ITIL and Why is ITIL Different?</li> <li>• ITIL Framework and an Overview of the Twelve Process Areas of ITIL</li> </ul>

Module	Topics
	(e.g. configuration mgt., asset/financial mgt., incident mgt., problem mgt., change mgt., release mgt., service level mgt., capacity mgt., service continuity mgt., capacity, mgt, etc.) <ul style="list-style-type: none"> <li>• Steps in Making ITIL Real</li> <li>• IT Service management and Delivery Assessment Maturity Model</li> <li>• Conducting a ITSMD Health Check</li> <li>• Select ITSMD Metrics</li> </ul>
6	Outsourcing and Vendor Management Excellence <ul style="list-style-type: none"> <li>• The IT Balancing Dilemma</li> <li>• The Outsourcing Decision-Making Scorecard</li> <li>• Major Outsourcing Trends, Issues and Challenges</li> <li>• Differences Between Domestic and Off Shore Deals</li> <li>• Empowering Executives to Outsource</li> <li>• Vendor Selection Process Flow</li> <li>• Key Vendor Evaluation Criteria</li> <li>• Key Governance Roles, Processes and KPIs</li> <li>• Summary Steps in Vendor/Outsourcing Selection, Contract Negotiations and Management</li> </ul>
7	Performance Management, Management Controls and Risk Management <ul style="list-style-type: none"> <li>• Principles for Achieving Performance Management Excellence</li> <li>• What Key Performance Indicators Should Be Tracked?</li> <li>• Linking Critical Success Factors to Key Performance Indicators</li> <li>• Governance Calendar and Balanced Scorecard</li> <li>• Select Examples of KPIs in Support of IT Governance Components</li> <li>• Key IT Management Controls</li> <li>• Risk Assessment, Management and Mitigation</li> </ul>
8	Summary, Lessons Learned, Critical Success Factors and Next Steps
9	Select Case Studies
10 and 11	References and Appendix (Managing Accelerated Change and Transformation

## **Contact Information**

For further information, please contact: [info@StartSmartS.com](mailto:info@StartSmartS.com)

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