GSA IT Strategic Planning with the Balanced Scorecard

GSA✪IT

March 8, 2018

Our Approach

❏ **Engage Leadership**
  ❏ Be present, be involved and be supportive in the process

❏ **Involve Customers and Employees**
  ❏ Cross-functional teams of SMEs made up of different voices in the organization

❏ **Ensure a Balanced Approach**
  ❏ View organization strategy from four different perspectives (customer, stewardship, internal processes, organizational growth)

❏ **Communicate Clearly**
  ❏ Keep it simple – avoid vague words
  ❏ Clear, concise, understandable
  ❏ Tell the story of what we are trying to do

"Tell me and I'll forget, show me and I may remember, involve me and I'll understand."

– Chinese Proverb

❏ **Put the Strategy into Action**
  ❏ Avoid document becoming shelfware
  ❏ Link performance at the organization, division and employee levels

What is the Balanced Scorecard?

- ❏ **Kaplan-Norton:** Organizational Strategy is viewed through **Four Perspectives**
- ❏ Integrates **Strategic Planning** and **Performance Management** - linking long-term objectives with short-term actions
- ❏ **Perspectives** give managers and executives a more **'balanced' view** of organizational performance
- ❏ Strategy is dependent on **internal** perspectives driving the success in **external** perspectives

Improved Customer and Financial RESULTS

Drive...

Improved Internal Processes

Drive...

Improvements in Internal Capacity

PERSPECTIVES

Customers	**Customer Satisfaction** ❏ How well are we meeting customer needs – through their eyes?
Stewardship	**Value Creation** ❏ How is strong stewardship and fiduciary responsibilities ensured for our customers?
Internal Processes	**Core Competencies and Processes** ❏ How do we improve internal processes to deliver products and services better, faster and cheaper?
Organizational Growth	**Our People, Tools & Technology** ❏ How can the skills of our employees be improved? ❏ What improvement in tools and infrastructure are needed?

External

Internal

How Do We Connect the IT Strategic Plan to Our People...

... so it doesn't become shelfware?

Getting On the Same Page

Strategic Planning Terms & Definitions

Strategic Plan	Document used to communicate the organizational goals; and activities and actions needed to achieve those goals
Mission	The organization's purpose described in the language of the business, including who is served and what products, programs and services are provided to customers and stakeholders
Vision	A vivid, emotionally inspiring, picture of a future to which the organization aspires
Strategic Goal	The strategic focus areas of the organization that defines organization's business strategy
Strategic Result	End outcomes from successfully executing the strategic goal
Strategic Objective	The specific continuous improvement activities that breaks down the strategy into smaller components
Perspectives	The different lenses through which strategy and performance are viewed, typically financial/stewardship, customers, internal business processes and organizational growth
Strategic Metric	Key performance indicators that focus on accomplishments or impacts to the organization
Operational Metric	Performance indicators that tracks outputs, efficiencies, quality or timeliness needed to maintain day-to-day operations
Strategic Initiative	New or continuing projects and actions identified to improve the performance of one or more strategic objectives

The Process: Part 1 - GSA IT Development

Facilitated Strategy Sessions to Build Engagement

DRAFT

1 Vision Session *Leadership Team* → **2** Strategic Goal Session *Leadership Team* → **3** Strategic Objective Sessions *Objective Teams* → **4** Strategic Metric Sessions *Metric Teams* → **5** Strategic Initiative Session *Leadership + Directors* →

INFORMATION TECHNOLOGY STRATEGIC PLAN FY2018 - 2020
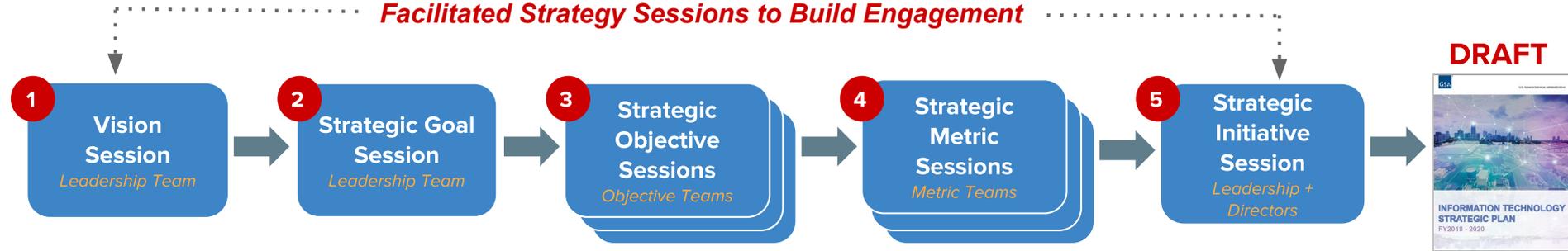
1 **Vision Session (Leadership Team)**
- ❏ Assess IT Mission, Vision, and Strategic Goals

2 **Goal Session (Leadership Team)**
- ❏ Refine our Strategic Goals
- ❏ Identify Goal Themes + Objective Champions

3 **Objective Sessions (Objective Teams = Directors + SMEs)**
- ❏ Define the Strategic Goal Results
- ❏ Identify Strategic Objectives (for each Goal)
- ❏ Identify Strategic Initiatives + Metrics

4 **Metric Sessions (Measure Teams = Leads + SMEs)**
- ❏ Identify Strategic Metrics
- ❏ Identify Operational (SLA) Metrics
- ❏ Identify Strategic Initiatives

5 **Initiative Session (Leadership Team + Directors)**
- ❏ Review all Strategic Initiatives
- ❏ Prioritize Initiatives across fiscal years

Strategy Session Outcomes

FACILITATED

5 Strategy Sessions

3 GSA IT LEADERSHIP SESSIONS
IT Visioning + 2 Strategic Initiative Reviews

DEFINED

11

STRATEGIC METRICS

SUPPORTED BY

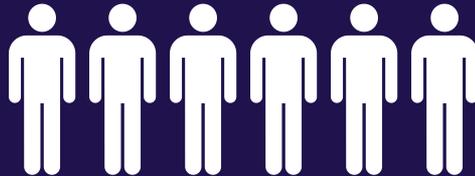42

OPERATIONAL METRICS

INVOLVED PARTICIPATION from

100%

GSA IT Divisions

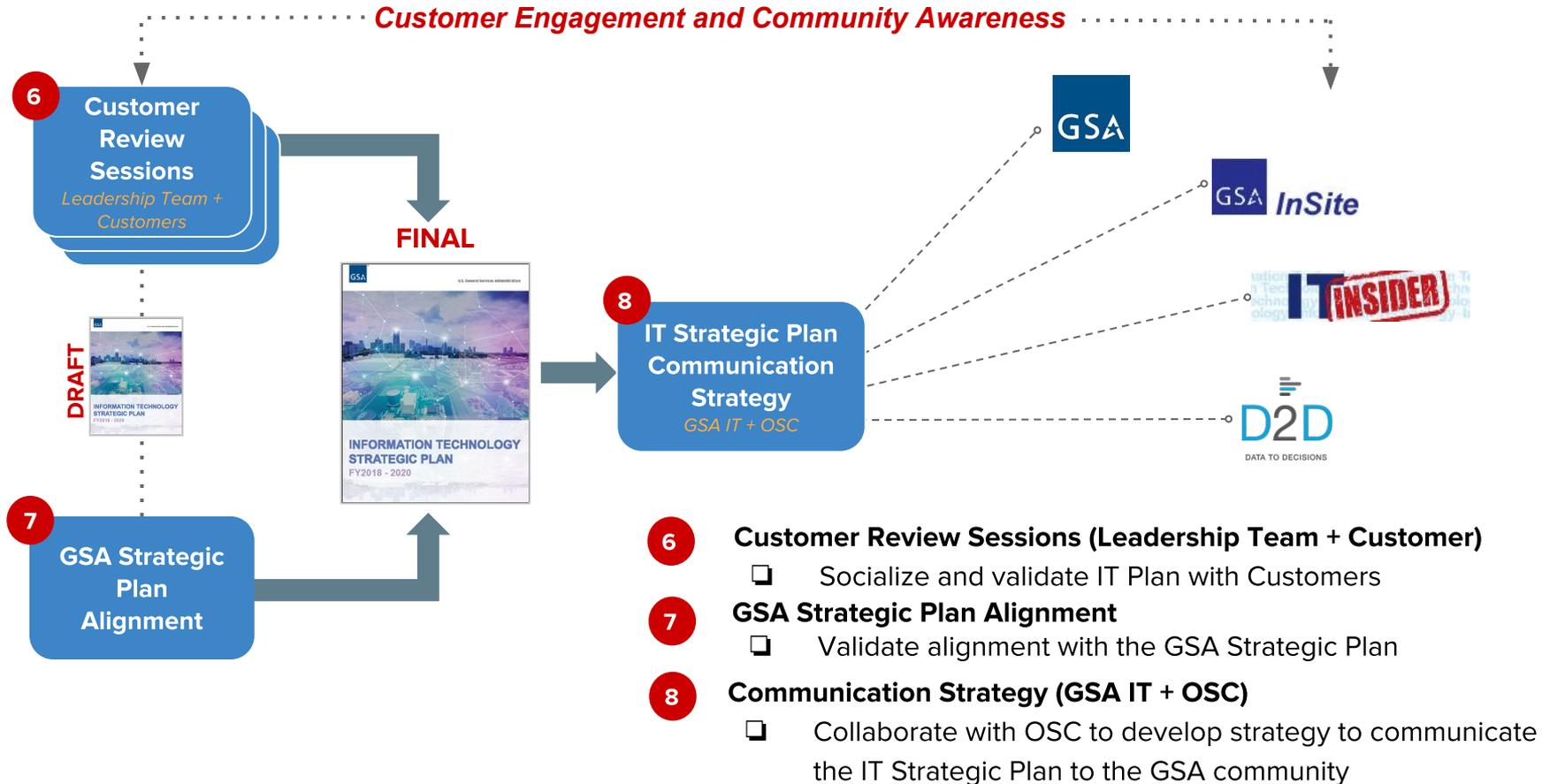**78** GSA IT Employees

PARTICIPATED IN SESSIONS

IDENTIFIED

11 Strategic Objectives

40 IT Initiatives

The Process: Part 2 - Customer Input

Customer Engagement and Community Awareness

6 **Customer Review Sessions**
Leadership Team + Customers

DRAFT

FINAL

INFORMATION TECHNOLOGY STRATEGIC PLAN FY2018 - 2020

8 **IT Strategic Plan Communication Strategy**
GSA IT + OSC

GSA

GSA InSite

IT INSIDER

D2D DATA TO DECISIONS

7 **GSA Strategic Plan Alignment**

6 **Customer Review Sessions (Leadership Team + Customer)**
- ❏ Socialize and validate IT Plan with Customers

7 **GSA Strategic Plan Alignment**
- ❏ Validate alignment with the GSA Strategic Plan

8 **Communication Strategy (GSA IT + OSC)**
- ❏ Collaborate with OSC to develop strategy to communicate the IT Strategic Plan to the GSA community

Cascading and Linking Performance

❑ Cascading and linking performance measures creates **organizational alignment to IT strategy**

❑ **Accountability** by aligning **clear**, **understandable** objectives, measures and initiatives to individuals

❑ Employees understand **how they contribute** to the IT strategy

❑ Performance metrics are **refined** with organizational **maturity**
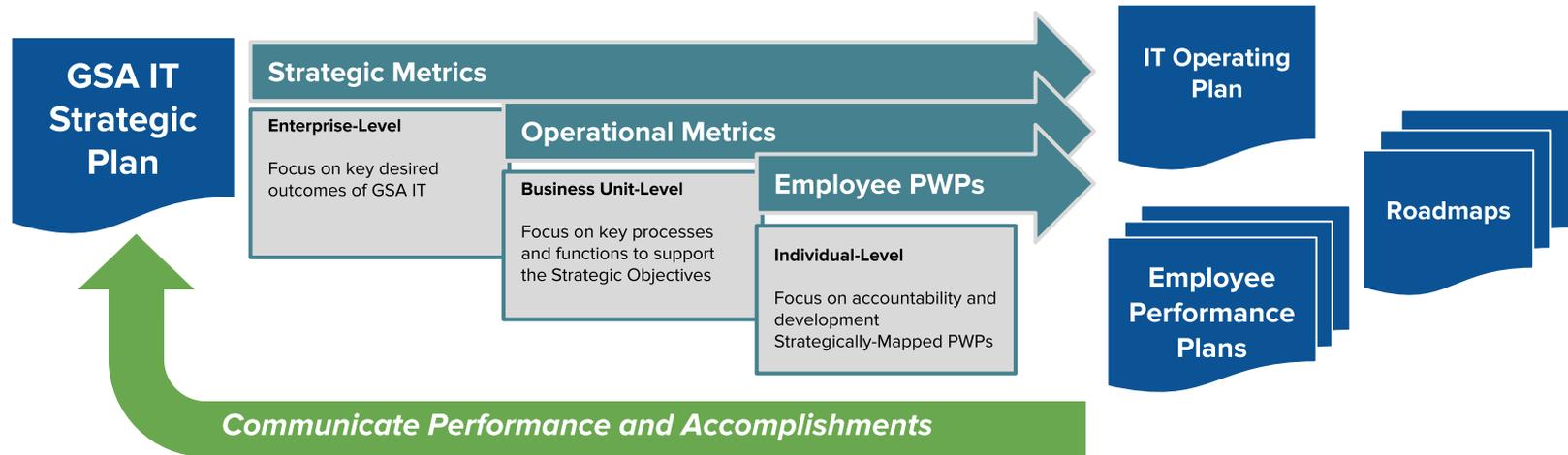
GSA IT Strategic Plan
FY 2018-2020

GSA IT Strategic Framework

IT VISION
To be recognized as a trusted partner and IT leader in the federal government

IT MISSION
To inspire and drive technology transformation by delivering innovative, collaborative and cost-effective IT solutions and services to our customers

STRATEGIC GOALS

- OUR PEOPLE, OUR CULTURE
- MISSION DELIVERY
- STRENGTHEN CYBERSECURITY
- OPERATIONAL EXCELLENCE
- INNOVATION LEADER

STRATEGIC OBJECTIVES

G1-1. Improve Employee Engagement and Morale
G1-2. One GSA IT Culture
G1-3. Invest, Cultivate and Retain a High-Impact Workforce

G2-1. Improve Customer Experience and Satisfaction
G2-2. Partner with Customers to Deliver Quality IT Products and Services

G3-1. Improve Awareness and Understanding of Cybersecurity Compliance,Threats and Impacts
G3-2. Enhance Cybersecurity Controls and Tools

G4-1. Improve Management Processes to Streamline Day-to-Day Operations
G4-2. Strengthen Governance to Facilitate Decision-Making

G5-1. Invest in Innovation to Meet Current and Future Customer Needs
G5-2. Promote an Innovative Culture

IT VISION
To be recognized as a trusted partner and innovative IT leader in the federal government

IT MISSION
To inspire and drive technology transformation by delivering innovative, collaborative and cost-effective IT solutions and services to our customers

CORE VALUES
Accountability | Honesty | Lead by Example | Emotional Intelligence

STRATEGIC GOALS

OUR PEOPLE, OUR CULTURE | MISSION DELIVERY | STRENGTHEN CYBERSECURITY | OPERATIONAL EXCELLENCE | INNOVATION LEADER

STRATEGIC RESULTS

| A highly motivated and creative organization that leverages the diverse skill sets of our people, innovative tools and collaborative culture to work productively from anywhere | Deliver the right IT products and services that exceed customer expectations | Protect and safeguard the GSA infrastructure by strengthening our cybersecurity posture and empowering ownership of cybersecurity responsibilities | Collaborate and operate as a high performing organization to deliver quality IT products and services | Explore, take risks, and invest in innovative ideas to help federal agencies do their jobs better |

STRATEGIC OBJECTIVES

| G1-1. Improve Employee Engagement and Morale G1-2. One GSA IT Culture G1-3. Invest, Cultivate and Retain a High-Impact Workforce | G2-1. Improve Customer Experience and Satisfaction G2-2. Partner with Customers to Deliver Quality IT Products and Services | G3-1. Improve Awareness and Understanding of Cybersecurity Compliance, Threats and Impacts G3-2 Enhance Cybersecurity Controls and Tools | G4-1. Improve Management Processes to Streamline Day-to-Day Operations G4-2 Strengthen Governance to Facilitate Decision-Making | G5-1. Invest in Innovation to Meet Current and Future Customer Needs G5-2. Promote an Innovative Culture |

STRATEGIC INITIATIVES

| • Employee Recognition Program • Rotational Program • Mentorship and Development Program • Core Values and Practices • Marketing Outreach • Workforce Skills Assessment | • User Experience (UX) • Network Bandwidth Upgrades and Laptop Refresh across GSA Regions • Core Application Performance Metric Tool • Cost Transparency for IT Service Delivery • Asset, Configuration, and Vulnerability Management • Execute FAS, PBS, and CXO Strategic Priorities | • DevSecOps • Cybersecurity Training Standing Security Briefs with Leadership and Customers • Continuous Diagnostics and Mitigation (CDM) Program • FISMA Metrics and Audits • Enterprise Certificate and Key Management | • FITARA Data Center Optimization Initiatives • Enterprise Infrastructure Solutions (EIS) Network Modernization • Streamline IT Processes and Frameworks • Shared Services Model • Financial and Cost Transparency • Agile Governance Process | • Research & Development (R&D) • IT Solution Strategy Roadmap • Modernize Data Analysis and Management • Evangelize IT Success Stories • Technology and Tools Training • Rebrand GSA IT |

STRATEGIC METRICS

| SM1. Workforce Engagement and Development Index SM2. Customer Satisfaction Index SM3. FAS IT Value Score SM4. PBS IT Value Score | SM5. Corporate IT Value Score SM6. Cybersecurity Posture Index SM7. IT Cost Savings/ Avoidance Index SM8. IT Cost Transparency Index | SM9. IT Governance Index SM10. FITARA Compliance Index SM11. Innovation and Data Analytics Index |

11

GSA IT Balanced Scorecard

PERSPECTIVES	STRATEGIC METRICS			
Customer	CUSTOMER SATISFACTION INDEX	FAS IT VALUE SCORE	PBS IT VALUE SCORE	CORPORATE IT VALUE SCORE
Stewardship	COST TRANSPARENCY INDEX			
Internal Processes	FITARA COMPLIANCE INDEX	CYBERSECURITY POSTURE INDEX	IT GOVERNANCE INDEX	
Organizational Growth	WORKFORCE ENGAGEMENT AND DEVELOPMENT INDEX		INNOVATION AND DATA ANALYTICS INDEX	

GSA IT Performance Dashboard (D2D)

D2D.gsa.gov
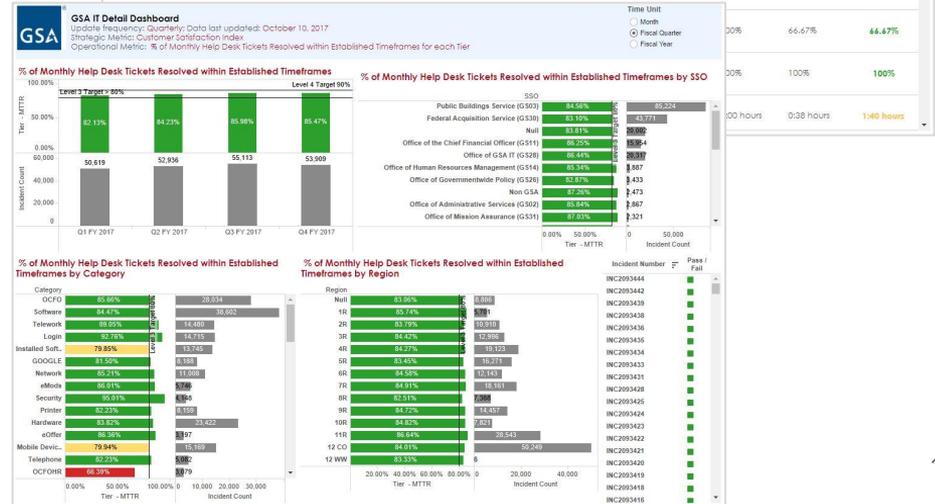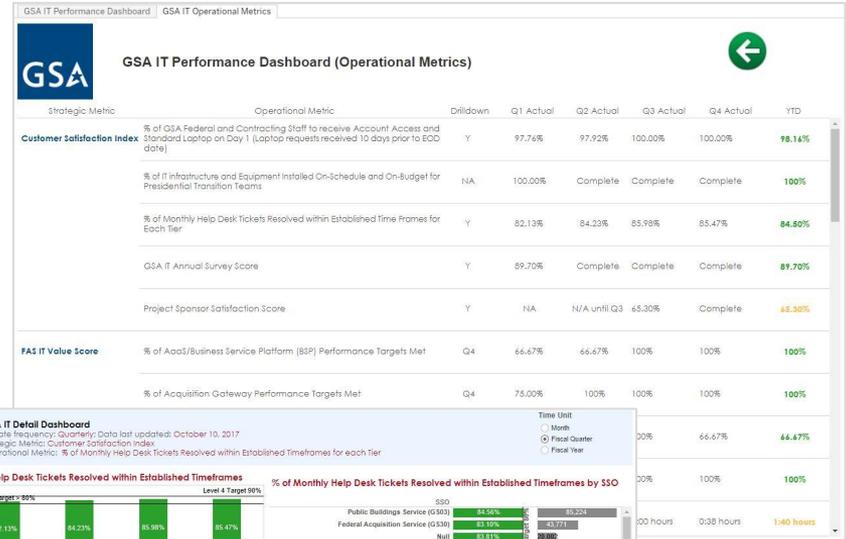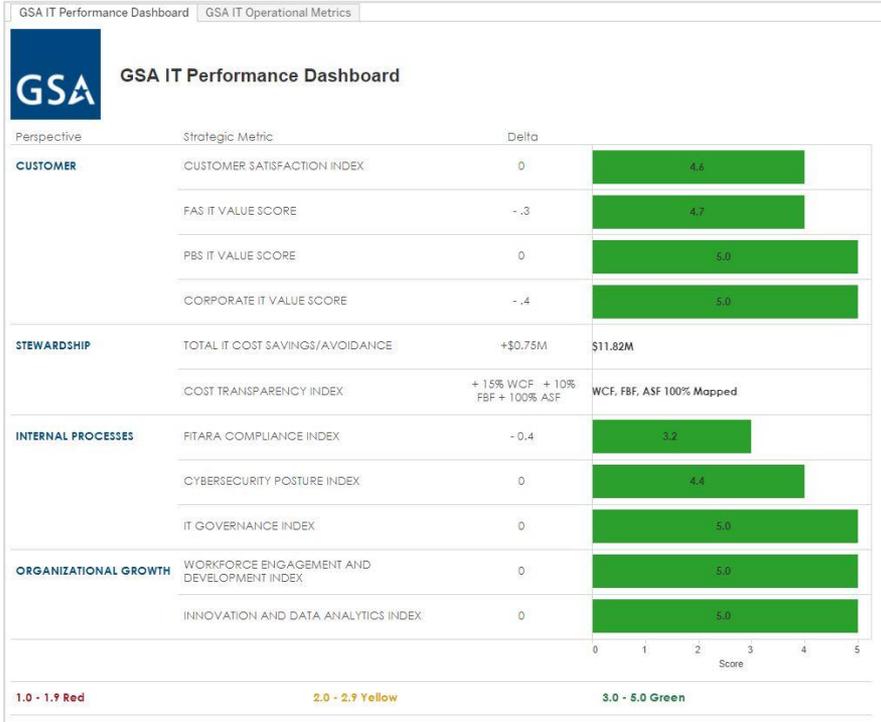
What's Next?

GSA IT Operating Plan

- ❏ Ensures IT Strategic Plan is executed for value to be realized
- ❏ Identifies _what_ needs to be done for each Strategic Initiative
- ❏ Delegates accountability to assigned owners of objectives, initiatives or measures
- ❏ Monitors and tracks key initiatives to support the IT Strategic Plan

Strategic Plan vs. Operating Plan	
Long-Term Focus (3 years)	Short-Term Focus (1 year)
Organizational-wide strategy	Business/Division unit strategy
Outcome oriented	Process oriented
Decisions have long-term impact	Decisions have short-term impact and easily reversible
High-Level strategic elements (e.g. Strategic Initiatives)	Operationally focused activities, milestones and tasks

Questions?