

LEADERSHIP PLAYBOOK

Fortune 1000 IT leadership playbook.

Why IT Leaders Must MOVE TO OFFENSE to Win.

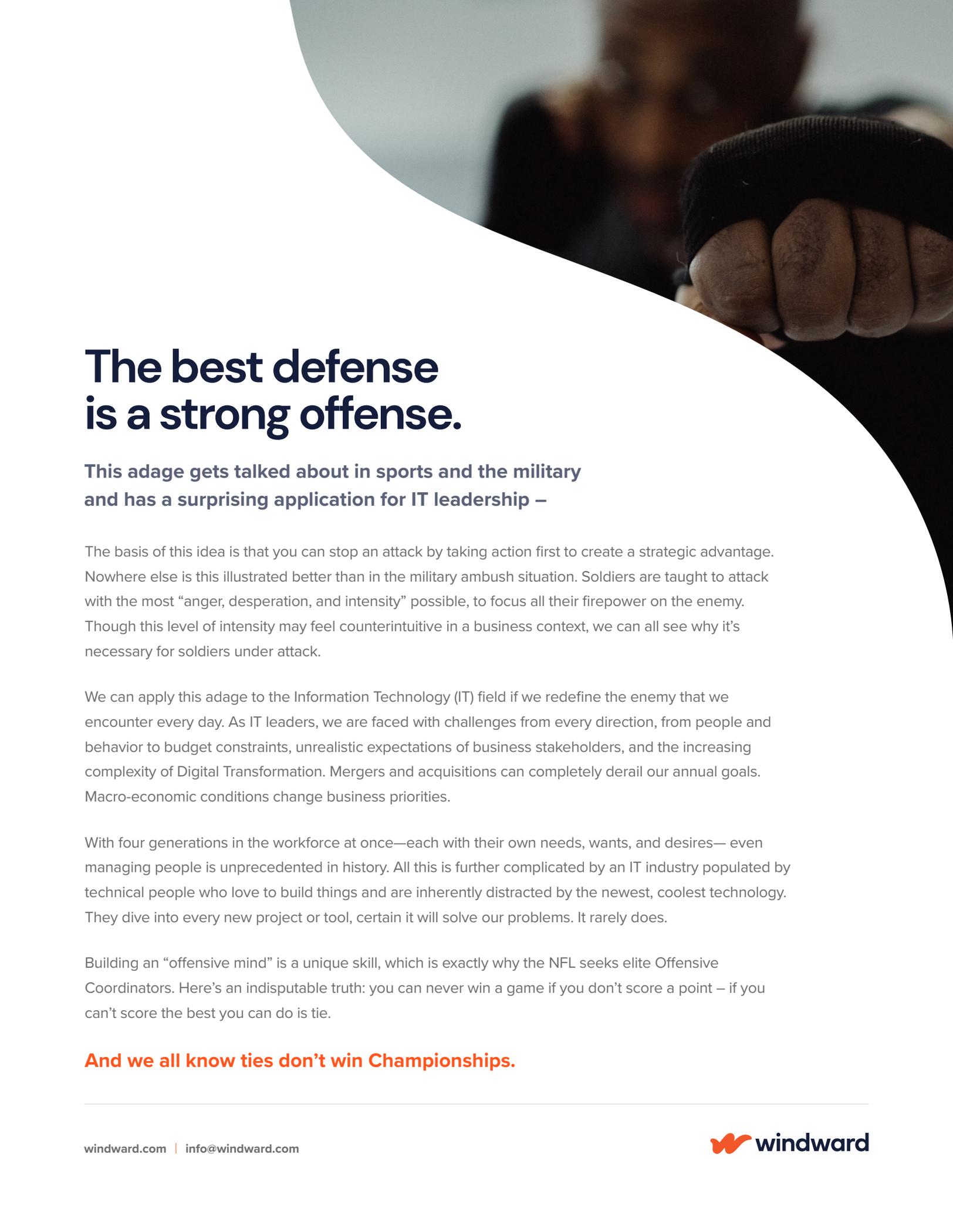
By: Sean McDermott

Sean McDermott is an IT Operations futurist, engineer and serial entrepreneur who has been driving scalable digital transformation with Fortune 1000 companies for over 30 years.

For more information contact:

windward.com | info@windward.com

 windward



The best defense is a strong offense.

This adage gets talked about in sports and the military and has a surprising application for IT leadership –

The basis of this idea is that you can stop an attack by taking action first to create a strategic advantage. Nowhere else is this illustrated better than in the military ambush situation. Soldiers are taught to attack with the most “anger, desperation, and intensity” possible, to focus all their firepower on the enemy. Though this level of intensity may feel counterintuitive in a business context, we can all see why it’s necessary for soldiers under attack.

We can apply this adage to the Information Technology (IT) field if we redefine the enemy that we encounter every day. As IT leaders, we are faced with challenges from every direction, from people and behavior to budget constraints, unrealistic expectations of business stakeholders, and the increasing complexity of Digital Transformation. Mergers and acquisitions can completely derail our annual goals. Macro-economic conditions change business priorities.

With four generations in the workforce at once—each with their own needs, wants, and desires— even managing people is unprecedented in history. All this is further complicated by an IT industry populated by technical people who love to build things and are inherently distracted by the newest, coolest technology. They dive into every new project or tool, certain it will solve our problems. It rarely does.

Building an “offensive mind” is a unique skill, which is exactly why the NFL seeks elite Offensive Coordinators. Here’s an indisputable truth: you can never win a game if you don’t score a point – if you can’t score the best you can do is tie.

And we all know ties don’t win Championships.

Why is Information Technology on defense?

The answer is complex, but it can be summed up in three primary areas:

1. External Macro Impacts Derail Our Best Laid Plans – These are broad-based, external events that have a significant influence on the company as a whole and may eventually trickle down to all departments. They include economic and market conditions, large-scale mergers and acquisitions, rapid shifts to the competitive landscape, disruptive business models, consumerization of IT, and increased demand for digital transformation. Macro impacts are generally unavoidable, and they can derail an entire year's priorities. However, if IT leaders are watching trends in the marketplace, it's possible to get ahead of these events.

2. Internal Micro Impacts to the Company Shift Priorities on a Dime – These are internal events that can change priorities swiftly, sometimes overnight. They include budget changes (positive and negative, especially at end-of-year), requirements from business units and stakeholders, reorganizations, regulatory changes, data breaches, adoption of disruptive technologies, and even Executive whims. Micro impacts can have a major effect in a very short time, and can be highly unpredictable. A good example is a data breach. That can single-handedly change the priorities of an IT organization within hours and derail the efforts of every ongoing project or employee priority.

3. Human Resistance to Change Slows us Down – These are all about human behavior and our ability to accept and embrace change. Change is hard, we know that. Humans are conditioned to opt for safety and security. It's part of the HumanOS (operating system), which has been programmed over tens of thousands of years. Shifting to OFFENSE demands change, reassessment, and improvement. Change-adverse organizations will struggle to make the shift to OFFENSE. Enacting change requires vision, empowering leadership, and the courage to make hard decisions for the better of the whole. It's lonely at the top.

The pressures of IT are immense, especially when you consider the three factors above. With technology changing so rapidly (see: Moore's Law), keeping up is nearly impossible.

Peter Diamandis shared his thoughts with Singularity University.

“ The forces driving innovation are acceleration and compounding. We're entering a period of time where we are about to start hockey-sticking. — Peter Diamandis.

Staying on top of current technology is a daunting, never-ending task—and it's not slowing down.

**But we don't have to accept defeat as our destiny.
We simply have to begin MOVING TO OFFENSE.**



Moving to offense starts with leadership.

As the Leader, the responsibility of MOVING TO OFFENSE lays at your feet. You set the vision. You make the hard decisions. You provide your staff every opportunity to be successful. Chances are if you are reading this, YOU are the franchise player your organization needs.

“ **Every battle is won before it's ever fought.** —Sun Tzu, The Art of War

There is a reason you are the leader. No one else sees the world like you do. Most people can't see beyond the project they are working on, but you see the bigger picture. Your staff are depending on you to bring your vision and experience to the team. They crave direction.

The best path for success is to build a team of A-players who thrive in change, provide them with a vision they can get behind, and give them the autonomy needed to execute.



Create agreements with your team, not expectations. Expectations are one-sided (and usually poorly communicated). Agreements require dialogue, negotiation, and commitment. Hold them accountable to their agreements, but do everything you can to break down barriers and enable them to succeed. To be a great leader and succeed in MOVING TO OFFENSE you must learn how to “read the defense.” Peyton Manning is considered one of the greatest NFL quarterbacks in history, despite his sometimes rough skills—he’s known for “wobbly” throws. But he is notorious for studying hours of game films in preparation. It’s his ability to “read the defense” which gave him a superpower, to make adjustments to plays mere seconds before snapping the ball.

He drove defenses crazy. They couldn’t react fast enough to counter his offensive shifts.

In IT, you are the quarterback. You need to read the defense. Defenses such as pending mergers, upcoming budget cuts, or potential staff and contractor layoffs. You need to continually look at market conditions and trends, review what competitors and peers are doing, perform blue sky-gray sky financial projections, and train your team to be A-players.

Much like the NFL, you create the plays and then empower your team to execute on the field.

Understand your vision.

The first critical aspect of MOVING TO OFFENSE is to develop your vision.

Your vision needs to be both long-term and short-term, but also be realistic in the context of your company. Every company is different, so ensure that you understand the capabilities and limits of your organization. We need to be able to self-reflect on our vision to ensure it aligns with the outcome we actually want.

I've made the mistake of having a vision that is misaligned with my desired outcome. As a runner, I have been drawn to running a marathon, but found myself in a constant battle with the dedication to training it would demand. Eventually, I realized my goals were completely misaligned. Running a marathon was a goal I would never achieve, because I could not execute on the training required and I was not emotionally committed. In fact, failing at training for the marathon derailed and demotivated me for long stretches of time.

In my heart of hearts, I didn't want to run a marathon. I realized my real goals were to optimize my blood test results and how I looked in the mirror. So I switched my focus to diet and running 5Ks four times a week. I lost 30 lbs in four months with 75% less effort, and my test results are, as my doctor says, "fantastic." For me, running a marathon was the absolute WRONG goal.

As IT leaders, we all need to be prepared to sprint and make meaningful progress in the short-term without losing sight of long-term objectives. But first, we must ensure both are actually driving towards our real desired outcomes.

“ Your vision for MOVING TO OFFENSE needs to consider the right goals for your organization and allow for realistic execution based on time, budget, and value to the business. ”

Before investing massive amounts of time and money in “cloud” like other companies, perhaps spending more time on a strategy to migrate legacy applications (or not) to cloud-based infrastructure is a better short-term goal. If you have a long-term vision of automating your IT operations over the next 3-5 years, perhaps the short-term vision is to document and organize all your operational processes and tools over the next 12 months.

To succeed we will need to be able to break our long-term vision up into short-term projects that are achievable and measurable. A clear, concise, and obtainable vision is critical when communicating to your team and setting goals for execution.

However, when I say obtainable, that doesn't mean it won't have challenges. We are preparing for a rapid acceleration of technology that is unprecedented. You'll need to push the envelope, but a turnaround is totally possible.

Only two months into a 6-month season, the Washington Nationals were 19-31, all but abandoned by fans and enthusiasts as an inevitable losing season. Five months later they were the 2019 World Series Champions.

Your vision can inspire and unlock the human potential, and create amazing, if not improbable, results. The power of humans to shift when properly motivated is incredible.

Five steps to become a better offensive leader.

In 2017 Kyle Shanahan took over the San Francisco 49ers, who the previous two years had a combined win-loss record of 7-25. Change doesn't come quickly, but Shanahan broke the organization down, assessed every part of the team, treated specific areas and addressed systemic issues.

Progress was slow, with a combined record from 2017-2018 of 10-22 and in 2019 they finished with a 13-3 record and successfully made it to Super Bowl LIV.

We need to take this same approach to MOVING TO OFFENSE in IT. A methodical and strategic approach to execution that will compound to create a big shift in the next couple of years. We will break this down to five distinct areas.



Vision.



Diagnose.



Prescribe.



Execution.



Operationalize.

Vision.

As the leader, you set the vision. What do you want the organization to be? How will you measure it? For a personal example, you might visit a doctor and say, “I want to be healthy.” But what does that mean? Will you focus on losing weight, quitting smoking, or minimizing risk factors for a heart attack? How will you measure it? You can measure weight, cholesterol, BMI, or heart function. Which ones are indicators of your desired outcome—and demonstrate small wins along the way?

In IT, you need to create a tangible vision with aligned objectives, such as customer response times, service provisioning times, Service Level Agreements, or cost metrics. Ensure these are measurable, such as 99% availability, provisioning and delivering a laptop in 48 hours, Mean Time to Repair (MTTR) of 4 hours, or bug fixes in 24 hours. Vision and objectives are contextual to every IT Leader and organization, but make sure they are clear, concise, measurable—and simple to communicate (more on that later).

Diagnose.

“Assessment” has become a 4-letter word in IT. I hear it constantly: “Not yet another assessment, we just want to get it done.” Frustration is understandable, after dealing with Big 4 Consulting Firms charging millions for PowerPoint studies and no plan for execution. But we can’t see what we can’t see. We need to understand the systematic issues under the hood to build a winning OFFENSIVE STRATEGY with a chance at success. We need to find the weaknesses in our tools, people, and processes while creating a plan for how to address them.

Some questions to ask are:

- Do we have the right systems to measure our progress?
- Do we have the right technology to execute our vision?
- Are our processes well-documented? How can they change and shift, if needed?
- How do we measure user adoption and user experience?
- How do we collect and implement feedback?
- Do we have the right people to execute the strategy?

We need to be introspective about our leadership, communication styles, and ability to drive change as an organization.

Prescribe.

As Peter Drucker says, “culture eats strategy for breakfast.”

Once we have the diagnosis, we can focus on putting together a multi-year roadmap to execute your vision. The roadmap needs to declare your vision, set desired outcomes, define the milestones, timelines, and roles. Think very hard about the order of your execution, priorities, and ability to get quick wins to build confidence and momentum with your staff.

Now's the time to recognize your A-Players. These are the people who believe in your vision and whom you trust to make day-to-day decisions to execute it.

If you discovered that provisioning new services takes too long, determine where the issues are, such as manual, time-intensive tasks, non-integrated tools, or multiple data entry points. If you are not meeting SLAs, identify the key business services you need to monitor and the systems that need to

be customized to collect the right data. If costs are misaligned to your budget, identify where your costs are going, such as internal staff, external consultants, tools, facilities, etc. You might consider resources like the TBM Framework to better understand costs, consumption, and performance and make business-aligned decisions.

Consider the process improvements and technology decisions needed to stay current. Ensure that your roadmap includes measurement mechanisms to track the performance of initiatives and make quick adjustments. I also recommend identifying “low hanging fruit” to achieve quick wins which build confidence and early momentum.

Align your vision to monthly and quarterly milestones, so your staff feels they are making progress regularly. When we all feel like we're winning while making progress on larger initiatives, it can ease the daily grind on less desirable tasks.

When you walk into a doctor's office they don't pull out the prescription pad and start writing a prescription before they have diagnosed the issue. When MOVING TO OFFENSE you must diagnose your weaknesses and then create realistic prescriptions that can be executed as part of a multi-year digital transformation strategy.

Execution.

Execution eats strategy for lunch. How many times have we decided we want to lose weight, exercise more, or quit social media, only to end up right back where we started (or worse)? Execution is where the rubber meets the road, and the most disciplined team wins.

This is where true leadership shines. Keeping your team motivated and on track can be a grueling task. Project management becomes critical here, with well-defined processes for assessing progress. Ensure that your project managers are not just "spreadsheet jockeys," but have the necessary context to understand the impact of decisions and results (or missed deadlines). Create key performance metrics and measure them regularly and religiously. As Leader, your job is to measure progress, prioritize efforts, make strategic decisions, and break down barriers for your staff to be successful.

Agile methodology is highly effective for this type of shift. With our clients, we develop a 3-Year vision with clear metric improvements, such as "Zero Down Time." We then develop three one-year Major Milestones and twelve quarterly Milestones. We break down each quarter into six two-week sprints.

Sprint planning and release meetings are scheduled and mandatory, never missed. Executives are briefed every two weeks with progress, issues, and challenges to the timeline, as well as current metric reports. Most importantly, we celebrate our successes quarterly, led by the Executive Team, and name a quarterly "MVP."

Do not underestimate the importance of celebrating the team's success and acknowledging progress. The HumanOS wants to feel like our efforts are meaningful—so make sure to build in celebrations and acknowledgment.

Remember to celebrate every win and every failure to keep your team motivated and inspired to reach the end goal. The truth is, if you aren't failing you aren't setting the bar high enough. Showing your team failure is as important as winning is the key to rapid digital transformation.

Tips for flawless execution.



1. Set the strategic vision.



2. Prioritize efforts.



3. Align tasks to strategic initiatives.



4. Create performance metrics.



5. Measure metrics religiously



6. Break down barriers to progress.

Operationalize.

Engineers have an Achilles Heel. Let's just acknowledge the fact that we love to build things...but many of us do not like running things.

In fact, we've found that most people start losing the "excitement" about halfway through Execution.

For any large-scale initiative, or a strategy as large as MOVING TO OFFENSE,

the most important determiner of success will be ADOPTION. Your vision, strategy, and execution have to ensure that ongoing operation is considered from the beginning. To be effective at operationalizing, you need to develop a Governance Model to measure improvement and ensure issues can be identified and corrected quickly.

Governance is like shooting an arrow. From 5 yards away, your aim can be off a few degrees and still hit the target. At 50 yards, that same few degrees could move you way off the mark. Time elongates errors. Lacking a well-defined Governance model can have disastrous results for a 3-year strategy.

Your Governance model needs to have well-defined objectives, key performance indicators, roles, and decision-making processes. You need to identify barriers and break them down, such as training, passive-aggressiveness, technical issues, security issues, etc. Lack of Governance will result in a short-term spike of improvement (much like a mirage), only to regress to the old normal.

As I stated, the key to success is adoption. When operationalizing a platform, we seek to measure adoption as a primary metric. This includes tracking user logins to measure how the system is being used. We perform surveys and "drive-by" meetings, where we can talk directly with users and gain feedback. We enact a formalized Change Management Board and change processes to ensure changes are implemented quickly and accurately. We regularly use videos to reinforce behavior, tracked with marketing tools to see if people are watching the videos.

Your main focus is to measure, seek feedback, create improvements, and assimilate the improvements into the organization. Rinse and repeat.

“ Eighty-seven percent of senior business leaders say digitalization is a company priority and 79% of corporate strategists say it is reinventing their business — creating new revenue streams in new ways. But so far, digital change has been slow and disappointing.

—Gartner

How to measure adoption.

- ✓ Track user logins
- ✓ Conduct surveys
- ✓ Do “drive-by” meetings
- ✓ Create a Change Management Board
- ✓ Create training videos & track usage
- ✓ Proactively seek feedback

In IT, leadership and vision are critical to ensuring that initiatives are successful, but it starts with your ability to motivate people. To succeed, you must first understand that all IT projects are a business transformation. Unless it's a simple upgrade, all projects will impact your people, process, and technology in some way. This is why strategy and Organizational Change Management (OCM) is mission-critical.

Most projects are considered a success if they are on time and under budget. This is antiquated thinking. You need to expand your definition of success to include user adoption and customer value. You must understand what your customers want and ensure everyone is enabled for success. Motivating people to not only change, but to thrive throughout change, is a sign of exemplary leadership.

Organizational change management is no loner optional.

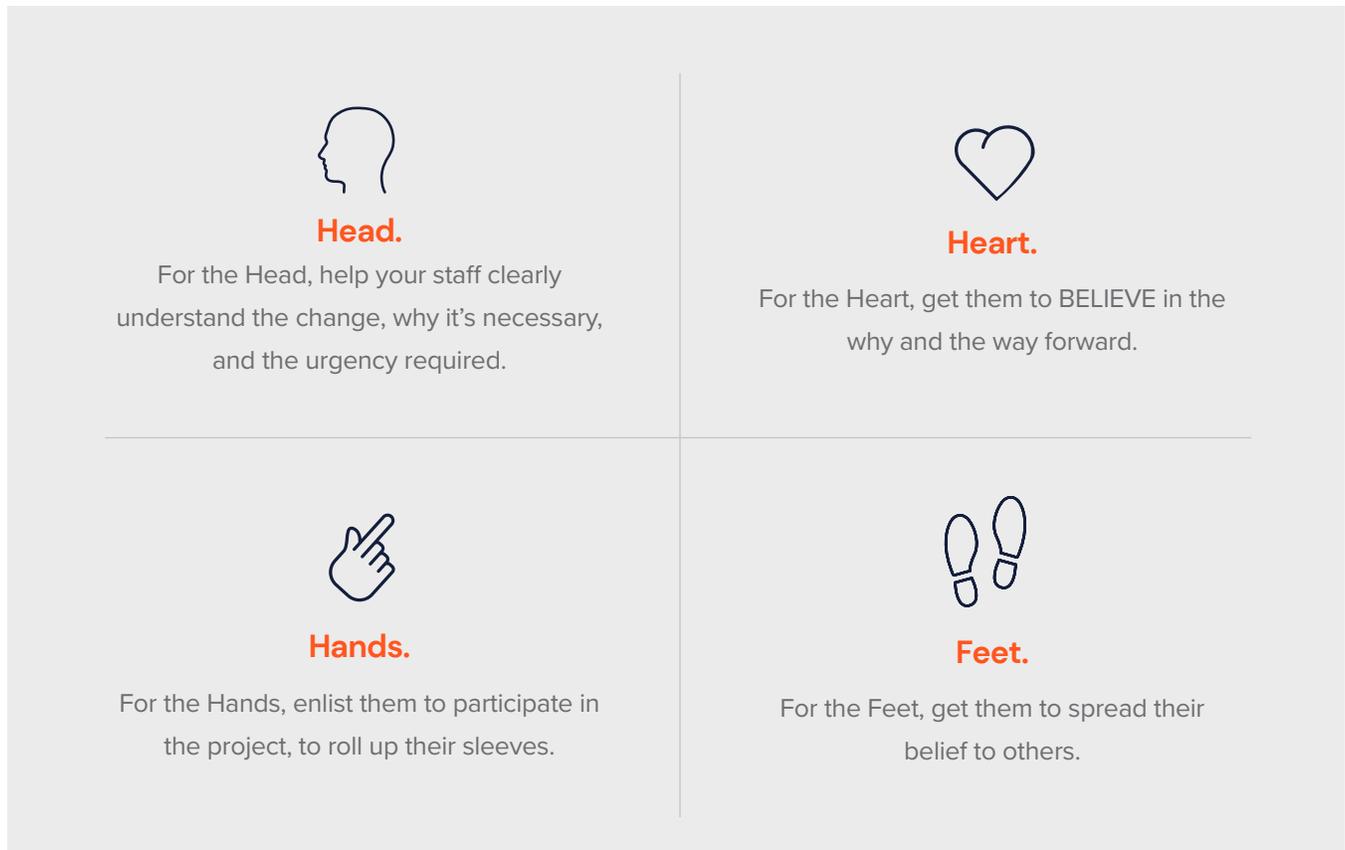
The human element is critical to MOVING TO OFFENSE.

Professional sports offer a clear example. It's so common for a team to have great talent and high expectations at the start of a season, yet fail miserably to make it to the post-season. Phil Jackson lead the Chicago Bulls to six NBA Championships with some of the most talented, ego-driven people on the planet. He then went to the LA Lakers, who were struggling despite having Kobe Bryant and Shaq, and won five more. Phil Jackson knows how to lead, motivate, and inspire players to operate as a team and row in the same direction.



There are FOUR key areas to think about when attempting to bring people along for your vision:

The 4 Motivation Centers of the HumanOS



1. Create a Sense of Urgency. What is your “burning platform?” Meaning, if you and your team were standing on a platform that caught fire, you’d move pretty fast to get the heck off of it. Find your burning platform—your why—and the form of urgency your team will respond to best. Humans can do amazing things when urgent action is necessary. But stop short of creating panic and a culture of putting out fires. Teams who are in constant fight-or-flight can’t access their most important brain functions. So seek ways to inspire unprecedented progress using urgency as a tool, not a weapon.

2. Talk People Through Your Vision. To inspire others, consider their most important motivation centers. In IT, we tend to believe that communication is documentation. We think emailing is communication. But communication is really about connection.

We are all humans and the HumanOS loves a good story. Consider turning your vision into a story, with a hero (your customer), a villain (your challenges), and a guide (your team). Help your staff understand their role. When communicating, understand what motivates them. A manager is motivated differently than a systems administrator. Engage face-to-face. Talk to people, sell them on the vision and their role. Instead of blasting out emails, try recording short 2-minute videos. Video personalizes communication. It adds a layer of humanity, so your team feels a deeper connection.

3. Reinforcement. IT initiatives are never successful upon completion of the installation or launch. We all know of projects that required a ton of time and money, but a year later people start questioning, “Why did we do that project?” Project success is based on user adoption, which takes time to measure. Make sure you are prepared for it. You have to continually monitor adoption, provide training, remove blockers, and ensure continual feedback and improvement.

4. Celebrate. The best teams have learned how to celebrate every win, no matter how small. They also celebrate their failures in incredible detail. They review their game footage inch by inch and turn it into macro and micro learning moments. The number one reason people leave jobs is because they don’t feel appreciated. Celebrate your wins and always praise people for their efforts!

On paper, these strategies seem like no-brainers. In practice, many IT initiatives skip these steps because, frankly, they are not sexy or fun. IT engineers would rather build. If you’re MOVING TO OFFENSE, building your skills requires discipline in motivating people by creating a clear vision with a sense of urgency, and relentlessly communicating your vision through personal interaction.



What can I do now?

The past two years brought not only a disruption to business-as-usual, but a unique set of challenges and opportunities that will only continue to ripple forward. This is an excellent time to reflect on your past 1-10 years and develop a new vision and strategy. If you believe MOVING TO OFFENSE is the right strategy for you, I suggest the following actions you start now:

- ✓ **Develop a 3-5 year vision** – This doesn't need to be a huge effort. It may even be a 10-page PowerPoint presentation. Just figure out what will move the needle for your organization over the next 3-5 years and what objectives can be set. Do a 360 review – talk to your CEO, other business leaders, your staff, and even peers outside your company. Ask questions and listen. The answers are most likely already out there. We start with questions like “What do you believe is holding the company or department back?” or “On a scale of 1-5, how would you rate our service or performance? What would you do to make it a 5?” Your questions have to be thought-provoking, create dialogue, and get your people to dig deep. Remember, their first answer is never the right answer. You have to lead them deeper.
- ✓ **Identify your squad** – You won't be able to execute a MOVING TO OFFENSE strategy alone. There's a reason there are SEAL Teams: it takes a team to execute. Enlist yours, and make sure they're A-Players from a variety of backgrounds, like finance, engineering, and customer support. We developed the 12-Attributes of an A-Team. These allow us to highly predict staff success. We also develop psychological profiles for key roles to ensure we place the right staff with the right attributes into the right positions. If possible, bring customers onto the team. Use your vision to capture their imagination.
- ✓ **Assess your tools** – When it comes to tools, everyone has “one of everything” and “software on the shelf we don't even use.” Tools take tremendous resources to maintain, including annual licensing and subscriptions, administration, and infrastructures (server and storage). Get your hands around what you have, and you will unlock savings from under-utilized or overlap tools to invest in your MOVING TO OFFENSE strategy. While this could be an arduous task, there are new technologies available that can rapidly assess your entire IT/Security toolchain.
- ✓ **Become a futurist** – All great leaders know learning is a constant. You can't fix problems you don't know about. Start by reading analyst research, learn about economic policies or conditions that might impact your organization, and start reading about emotional intelligence in the workplace. Schedule regular meetings with your third-party analysts, like Gartner or Forrester. I regularly read CIO Magazine, InfoWorld, and The Economist. The more you learn and expand your knowledge, the better you can build offensive positions and new plays that negate the impact of macro and micro shifts that would previously derail your strategy.

MOVING TO OFFENSE is a journey, not an event. It takes courage, vision, diligence, and patience. But, when successful, you can make the shift from being a game-changer to being a game-maker. HUDDLE UP WITH OTHER TOP PLAYERS IN IT!

Want to stay on top of your game?

Subscribe to AIOps Evolution Weekly and get insights from CEO Sean McDermott & Windward's VP of Client Success, Bill Driscoll. You'll hear perspectives from industry thought leaders on automation, artificial intelligence, machine learning, and other next-generation technologies poised to transform the IT ecosystem - and make life simpler for IT teams.

This weekly podcast includes

- ✓ Informative deep-dive talks Sean and other Fortune 1000 IT Leaders,
- ✓ Thoughtful, intelligent analysis of what's coming, and what to do about it.
- ✓ From-the-trenches reporting on the next wave of IT Ops innovation.

Yes! I'd like to check out AIOps Evolution Weekly.

Who's ready to move to offense?

you are ready to get off of defense and make the shift to offense for your IT Operations team, there's no better time than now. The rate of acceleration is accelerating. Our ability to predict change over the next 2, 3 and 5 years has never been more difficult.

To remain viable we need to increase agility without compromising infrastructure. I've created an A-Team with a proven track record for successful digital transformation that is ready for what's ahead. From project inception to completion...we've got you covered.

If you're ready, let's schedule some time to assess your needs and formulate a strategy.

Yes! I'd like a meeting with Sean's A-Team.

Sean McDermott is Founder and CEO of Windward Consulting. McDermott previously acted as founder and CEO of RealOps Inc., the pioneer in enterprise management run book automation solutions, which was acquired by BMC. McDermott's curiosity for advancing technology began at his first job as a network engineer/architect installing and managing the first private internet for the U.S. Department of Justice. At a time when the internet was just taking off, he was at the forefront and has continued to be on the cutting edge of technology with the development of Windward and RedMonocle. He is an advocate for business leadership strategies and shares how other entrepreneurs can align passion and action on his blog, Wheels Up World.

LET'S TALK

Ready to find flow?

We're Windward, and we help clients plan, build, and operate
AI-optimized IT infrastructures that align with business processes.

windward.com | info@windward.com