

# The Infrastructure and Operations Leader's First 100 Days

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What you do in your first 100 days as a new infrastructure and operations leader will be critical to your success. Focus on carefully selected and targeted business outcomes, communications and relationships in the early days of your new role.

## Key Findings

- Success as a new infrastructure and operations (I&O) leader depends upon establishing a foundation from the beginning. This requires that you gain a firm grasp of stakeholder expectations, understand how to deliver value, and clearly communicate your goals and objectives.
- Creating an I&O vision, gauging I&O maturity, and evaluating the current state of critical enablers — such as staffing expertise, capacity, the operating model and organization design — all support the ability to deliver valuable results quickly. Successful I&O leaders ensure they have significant line-of-business involvement, and a clear brand, communication plan, and initial set of metrics. They also find time to work with key stakeholders to address new capabilities or innovations that support digital business initiatives, even while being continuously overloaded by daily operational issues and firefighting.
- A laser-like focus on planning to deliver well-run operations with innovative infrastructure technologies to support the organization's digital business strategy will increase your impact, how you are perceived, and your value as a new I&O leader.

## Recommendations

In their first 100 days, new I&O leaders should:

- Link I&O initiatives to targeted business outcomes and required future-state business capabilities by creating an I&O value map.
- Initiate an adaptive business engagement approach by forging relationships with key internal and external stakeholders, and verifying their preferred approaches for ongoing and continuous business engagement.

- Improve business stakeholder perception of I&O by devoting roughly one-third of their time to investigating and, if warranted, making improvements to drive better reliability and responsiveness.
- Build their personal credibility to inspire and gain trust, and to drive needed change by prioritizing five key I&O deliverables and acting on two of them within the first 100 days.

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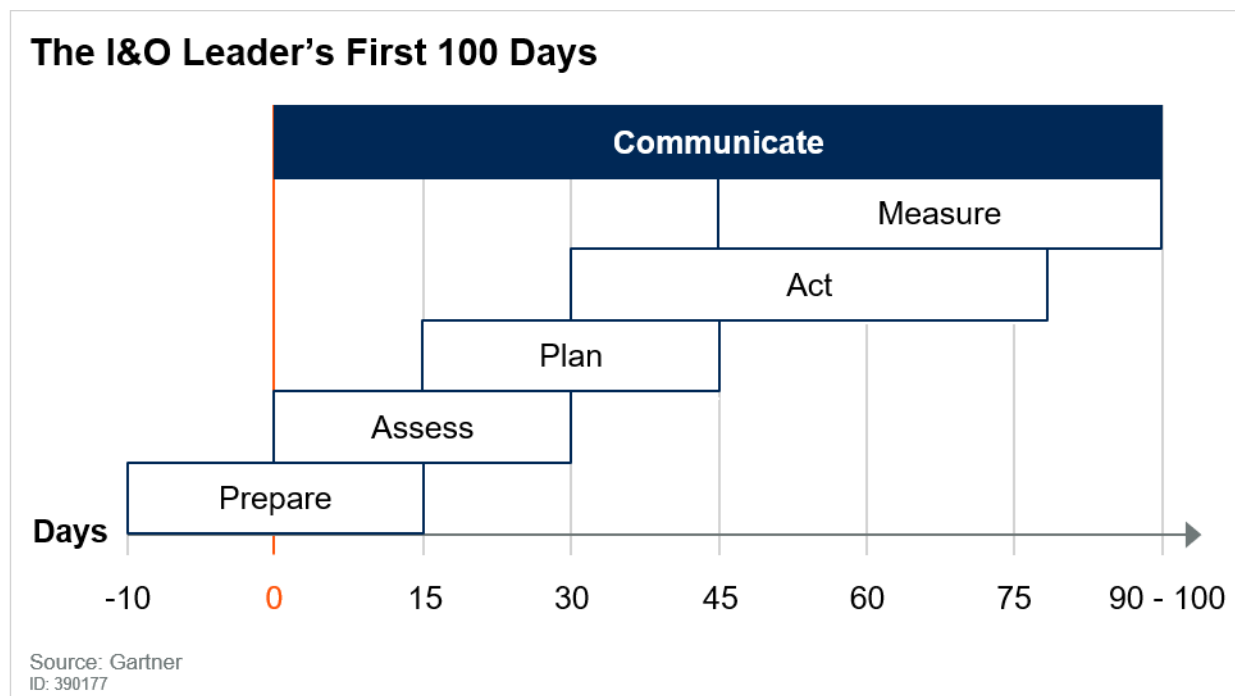
Introduction

The first 100 days constitute an expected “honeymoon” or transition period. This all-too-brief period is yours to formulate a course of action, make connections, and establish and communicate a personal management style. It is within this critical period that you establish yourself and create the basic perceptions that others will, for better or worse, associate with your subsequent plans and actions (see Note 1).

Proper preparation, assessment, planning, acting, measuring and, above all, communicating can greatly enhance your chances of success. This research highlights key activities that focus on critical issues, and provides actions and resources to help you achieve your intended outcomes. Gartner also offers a unique companion experience to this research in Gartner PeerConnect (see the [Enterprise IT Leaders Infrastructure & Operations](#) PeerConnect forum). You can use this forum to meet other newcomers to the I&O leader role, discuss challenges and obtain support from like-minded peers.

Figure 1 provides a handy roadmap to help you identify key milestones as you transition to your new leadership role. We break down your first 100 days into six overlapping phases, each with suggested durations that you can customize. Each phase includes critical target outcomes, resources and activities, as well as some optional ideas to consider as time and resources allow. The Communicate phase spans the full duration, and we include specific actions for effective communication for each phase.

Figure 1. First 100 Days Roadmap



In brief, a successful agenda for the first 100 days should:

- Begin prior to your arrival on Day 1.
- Discover I&O service reliability and responsiveness needs by forging relationships with your key stakeholders and sponsors, including employees, IT leadership, vendors, and business partners.
- Drive I&O actions that deliver business value and build your success by focusing on a subset of higher-visibility business outcomes, often around digital business.
- Decide how to define and measure success, for both you and the I&O function, by using this research to guide your planning and delivery.
- Build your credibility by communicating the business value of I&O clearly, and engaging your stakeholders in regular, open communications.
- Document how you will establish and build I&O maturity, scale and scope over the first 100 days by developing a roadmap for your I&O function, including quick wins.
- Perform a skills, behaviors and capabilities inventory, for today and future states. Develop a talent management strategy to bridge gaps and grow overall I&O capabilities. Do not lose sight of the criticality of behavioral development in tandem with technical skills. These are crucial as part of a transformation journey.

- Avoid getting locked into commitments that may not support your updated vision by pausing purchases over 10% of the annual I&O budget until you can vet their applicability to your vision.

## The First 100 Days Plan

### Prepare Phase (Days –10 to 15)

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Use the period of transition into your new role wisely, as it offers a window of time in which to build relationships, gather your thoughts and prepare. Take some key actions before your start date to inform yourself, and learn about your colleagues and staff. Learn what is expected of you and the I&O function in your organization and what success looks like, and draft communications to make a great Day-1 impression.

#### Target Outcomes for the Prepare Phase

- An I&O stakeholder value map, as well as an understanding of the expectations and influence of each stakeholder on you and your teams.
- A clearer understanding of the expectations of the role, and what the success criteria will be. You should write this down in less than 300 words for your personal use and review.
- An understanding of what has come before and what the organization's understanding and perception is of I&O.
- An initial vision of your management philosophy and approach for developing meaningful relationships with your new staff and stakeholders in a communications plan.

#### Actions for the Prepare Phase

Don't make the mistake of approaching your new role with ad hoc communications and plans. Invest time to plan before you start your new job to ensure critical preparations are completed.

#### Actions Before Day 1

To help maximize the value of the first week, complete the preparation phase by taking the following actions in the week or two before your arrival:

**Learn about the company you are joining.** Review annual reports, press releases, news articles, etc. Also review and understand the overall vision, mission and business strategy.

**Review your job description** and what is expected of your role. Identify your managers' expectations of you, as well as the success criteria. How are you being measured? Focus on the short term (less than one year) and the long term (one to three years). Does the job description tell you what constitutes success? If not, then what do you need to find out, and from whom, in order to validate the skills required, competencies, role responsibilities and expectations?

**Familiarize yourself** with “Leadership Vision for 2019: Infrastructure & Operations Leaders” to understand where the I&O function is heading. Also review “How to Be a Successful I&O Leader in the Era of Digital Business” to learn about your role as a new I&O leader in a digital business context.

**Reinforce connections** by sending thank-you notes to interview participants to build relationships and a positive tone for your next interaction. If you are new, set up lunches with a few key people. If you have just been promoted, reinforce existing relationships by treating your new peers as equals. These actions will demonstrate that you are a “people person,” in addition to being an exceptional technology leader.

**Set logistics** by connecting with your HR and administrative support staff to resolve logistics that can be completed in advance, including a meet-and-greet session on your first day. This drives home the point that you will be active and productive from Day 1 and expect the same from others.

**Understand your organization’s structure** by requesting organization charts and other basic material to review the structure of your new team and key leadership roles across the organization. Request overall organization material and specifics for IT and I&O.

## Communications in the Prepare Phase

### Before Day 1

**Assess your communications and listening skills.** Follow these best practices for effective communications:

- Master active listening. For many of the meetings you will have initially, practice an 80/20 rule, you should be listening 80% of the time.
- Use business terms wherever possible and avoid technical jargon. Define any specialist terms, such as IT abbreviations and acronyms, as these can mean different things to different people.
- Be brief, clear and consistent in your messages across forums and audiences.
- Avoid generic statements (for example, “IT is a critical input to the business”), and focus on what is specific to your organization’s performance.
- Connect plans explicitly to the strategic investment objectives of the enterprise, thus demonstrating that you and your I&O function are synchronized with the business.
- Socialize your plans to IT peers and business leaders across the organization, and actively solicit feedback before presenting to a larger audience.

**Write an introduction:** Prepare introductory communications material about yourself, your background and your initial thoughts on joining the organization. Make this content as fact-based and neutral as possible and keep it short and succinct. For example, try a 100-word bio, along with some personal information about your key priorities in life and work, your value system and integrity.

**Prepare an elevator-pitch-style introduction:** Assume you will encounter peers, stakeholders and team members throughout your first few weeks, when their influence and impact on your role is as yet unclear. Prepare a short “elevator pitch” that you can use to introduce yourself in a very short period of time (i.e., the length of an elevator ride) with clarity and a personal touch — leaving a positive impact on those you encounter. You will refine this elevator pitch over your first 100 days as you learn more about your role; keep this first iteration personal and friendly in nature.

**Draft discussion guides customized for the audience (that is, all stakeholders, including leadership and staff members):**

- **Stakeholder discussions:** Prepare a list of no more than five to seven questions — some specific, others open-ended — that will ensure that your early conversations yield insights beyond polite meet and greets. For example, while meeting key business stakeholders, ask them about their perceptions of and satisfaction with the current state of I&O. Probe especially around reliability and responsiveness,<sup>1</sup> and inquire about any urgent issues that they feel must be resolved as quickly as possible. Seek out chronic pain areas, their priorities and general expectations. Anticipate which questions you will prioritize if time is cut short.
- **Staff discussions:** Prepare a list of similar questions for your first meeting with your staff. Ask them about their key work challenges and constraints, as well as their perceptions and satisfaction levels concerning their own teams and organizations. Remember, a lasting memory of a new leader is often a personal one; therefore, inquiring about their personal motivations and job satisfaction serves not only to inform you, but to leave a positive impression on those you speak with.

Some sample discussion questions are included in Table 1. Adjust them to suit your users’ styles and preferences. This will help you understand your role, and the key challenges of your job as others see them. When possible, complete this table yourself, rather than delegating it.

Table 1. Sample Discussion Questions

	Senior Executive Leadership		Management		Staff		
	Business	CIO/CTO	Business Managers and Peers	IT Peers	Business	IT	I&O
How well does our team deliver on your requirements and expectations?	✓	✓	✓		✓	✓	✓
Who are the key contributors to your success (in IT or business operations)?	✓	✓	✓	✓	✓	✓	✓
What promises and commitments to the organization have been made for the next six to 12 months?	✓	✓	✓	✓			✓
Who else should I talk with concerning your experiences with I&O?	✓	✓	✓				
Which of my IT peers are critical to the team's success?		✓	✓				✓
What are our users' perceptions of I&O (positive and negative)?	✓	✓	✓		✓		✓
When and how should we communicate with each other?	✓	✓	✓				
What is the most enjoyable aspect of working in our team?						✓	✓
Which skills are you the most enthusiastic to develop?							✓
What's good about our culture?						✓	✓
Do you think there are aspects of our culture that holds us back?						✓	✓
Is there anything you think could really negatively impact our team in the next 90 days that I should know about?						✓	✓
Do you feel you have a well-defined career path and opportunities for advancement within the organization?						✓	✓

Source: Gartner (July 2019)



## Actions and Communications on Day 1

Your first day on the job should be all about listening and communicating, so we've combined this phase's actions and communications tasks:

- Do not try to tutor your stakeholders. Rather, show them the value of your effort by exploring and listening to their needs. Use that to illustrate not only how I&O deliverables add business value, but also what you can do for them.
- Actively listen to all staff you engage with, I&O and non-I&O. This is the window of time where you are building trust. Reserve judgment at an early stage, and avoid "command" instructions that compromise reporting structures. Focus on what your staff want to talk to you about, and why they want to talk to you about it — rather than whether you agree with their point of view at this early stage or not.
- Communicate through multiple channels, from spending time with stakeholders through formal communication messages and informal "brown bag" or working-lunch sessions.
- Develop a plan for timing the delivery of communications. Establish a regular pattern of ongoing communications, as well as a continuing dialogue with your stakeholders. This will help develop a reputation for making and keeping commitments.

Establish an understanding of when you will be assigned probationary-period targets by your line manager. Visibility of these targets may influence early stage conversations with others and help in improving your ability to prioritize additional requests for your time.

### For stakeholders:

Meet with your stakeholders — especially key stakeholders — and discuss their vision, their perception and what they need from you, your team and the I&O function overall:

- Explore what your stakeholders' vision is regarding what they want from you and what they want from the I&O function. Begin with your key stakeholders — that is, the person or people you will report to, and those who will be closely involved in or impacted by the I&O function.
- List their interests/influence on I&O. Business-outcome-driven I&O is a collaborative effort involving stakeholders from across the organization, such as development, security, enterprise architecture, project managers and IT executives.
- Listen carefully to their responses. Align and chart each individual along the five I&O adaptive business engagement activities:
  1. **Evangelizing:** Keep partners abreast of emerging digital trends in I&O and educated on opportunities to create value from new I&O technologies, delivery models, capabilities and services.
  2. **Consulting:** Offer partners advice and frameworks to enable successful business leadership of their internal or external technology investments and decisions.

3. **Brokering:** Provide partners the internal and external connections needed for their leadership of technology investments compatible with current I&O solutions.
4. **Coaching:** Develop partners' skills to help them make full use of I&O technologies, delivery models, capabilities and services.
5. **Delivering:** Partners want I&O to own and operate the process of delivering technology functionality, or to provide integration capabilities for business-led technology investments.

Following your stakeholder discussions, use the input you have collected to draft a one-page I&O vision and mission statement. Start with the business vision, strategy and outcomes. In some organizations, an enterprise or IT charter is a good way to capture these discussions and set out the scale and scope of your mission. Use "The Art of the One-Page Strategy" to help you start.

### For your first team:

Meet with your immediate team members — peer IT leaders — and discuss their vision for the I&O function:

- Get a sense of their skills, competencies and aspirations.
- Explore I&O's relationship with your peers' teams. How do they work together? What successes have they had? What opportunities are there for the future?
- Seek to understand what transpired before and what successes and failures previous leaders have had. This will set the context for your focus and for the messaging you will need to create. Every individual can offer valuable insight into the history of I&O in the organization.
- Manage expectations of others by explaining to your peers about how you intend to spend your first 100 days too. Solicit feedback as to their opinions on your plan, to assure you are on the right track. This provides clarity on what you plan to do, and highlights any needs for their assistance.

### For your direct reports:

Call a meeting for everyone on your direct team, in person, and, for remote workers, through video conference. This meeting has two objectives: to introduce yourself, and to show that you are approachable and available to everyone. Offer no opinions of any kind. Explain that you are still gathering information and are not yet ready to make decisions or changes. This will give your direct reports the ability to settle any apprehension within their own teams because they can say they have met and spoken with you. It is extremely likely what you say in these sessions will get passed on to others, so bear this in mind and coach your direct reports on how they should communicate in a positive manner. Maintain consistency in your messages if multiple sessions need to be run.

During the team meet-and-greet session:

- Deliver an introductory message that you have prepared in advance. State when you will report back to the team with updates on your progress.

- Encourage the people attending the meeting to introduce themselves in their own ways and to ask whatever questions are on their minds.
- Remember some detail about each person that will help you start conversations later.

After the team meet-and-greet-session:

- Set up one-to-ones with your direct reports to establish a cadence for ongoing communications. After seeing them in this group setting, early one-on-one meetings offer a good opportunity to explore and understand their personal motivations.
- After the one-to-one meetings, and in the context of the team meet-and-greet, assess your direct reports' concerns, priorities and career aspirations. Which ones understand and can describe the bigger picture? Which ones seem siloed in their views? Where do they need immediate help?

**Distribute your introduction:** Distribute the introductory remarks to the wider IT organization. See if you can post the text on the company intranet.

### **Regroup with your manager:**

Wrap up the Prepare phase with a meeting with your manager that covers:

- The key I&O challenges and opportunities from your point of view.
- Your preliminary strategic vision for I&O in the context of your IT peers.
- A communications schedule between the two of you — add those dates to your calendar now.
- A brief status update on your progress toward probationary targets.

## Resources for the Prepare Phase

### **Gartner Research and Tools**

Review these key Gartner resources to get started:

- “Toolkit: Sample Job Description for the Head of IT Infrastructure and Operations”: This sample job description was written for your new role.
- “IT Key Metrics Data 2019: Key Industry Measures: Cross Industry Analysis: Current Year”: This research shows typical IT spending practices in an industry.
- “Creating the Communications Core: The CIO’s Guide to Effective Communications”: This research offers effective communications approaches for all IT leaders.

## Other Suggested Resources

- **Company and industry websites:** Understand the fundamentals of your new employer's industry, market, competitive positioning and regulatory situation to ensure that you align I&O to your company's business needs.
- **Published financial reports:** Review public financial data like earnings reports, 10-K filings and reports for investors to gauge trends. Has the company been growing, declining or static in terms of market share, revenue and income? How has the stock price performed relative to the overall market? What is the IT spending? How does that compare with industry averages?
- **Press releases and other news reports:** Review recent news reports for other trends, such as new products and services, acquisitions and staffing levels. Does the enterprise appear to be an early technology adopter? Does it have any visible partnerships with specific technology providers? What appears to be its current I&O sourcing strategy?
- **Corporate blogs, LinkedIn, Facebook and Twitter:** Subscribe to or follow these important communications channels.
- **Gartner PeerConnect:** You can connect, collaborate and share real-world advice with peers. Exclusively for end-user professionals.
- **Professional networking and employee feedback sites:** Assess how current and former employees express their views of the company and their perceptions of IT and I&O. Based on what you see, would you expect employee engagement to be relatively high or low?
- **Job sites:** Get an idea of staff hiring trends and turnover. How many other IT or I&O positions are currently being recruited? Does it seem like IT is expanding?

## Assess Phase (Days 0 to 30)

Use this period to gain as much insight as possible into the current state of the I&O organization, and to build relationships with key stakeholders and your staff. The objective is to establish what is working successfully, and what isn't.

### Target Outcomes for the Assess Phase

The tools and advice in this section will help you:

- Gain an understanding of how the I&O function will add business value.
- Achieve a quick win, and ideally one that will be perceived as addressing a real business challenge:
  - Describe the value quantitatively and qualitatively and review it with your manager.
  - Identify key business outcomes to address.
  - Prioritize those outcomes and trade-offs.
  - Pick one or two that are prime for I&O influence and success.

- Refine first impressions and new relationships with your staff, managers and key stakeholders; data and insights on the current state of the I&O organization; and management's expectations for performance, including major challenges, opportunities and I&O metrics.
- Inventory your staff, contracted service providers and other resources. Assess their skills and capabilities, and the criticality of your direct reports.
- Examine documented IT strategies and the high-level progress made toward the strategic goals expressed within them.
- Explore the influence of IT policies and IT governance on your team and what you must deliver.

### Actions for the Assess Phase

Begin your assessment by understanding what strategies your team is executing, the constraints and governance it must adhere to, and the resources you have immediately available to you.

#### Assess and act on your organization's business vision for I&O:

- Make a first iteration of a business outcome statement — a five- to seven-page presentation.

#### Gather information:

- **Listening tour:** New I&O leaders will often engage in dialogue with a large cross-section of key stakeholders. A listening tour is a semistructured series of meetings to unearth areas of opportunity and strength in the I&O organization. Spend most of the time in these meetings listening and questioning, primarily to solicit further feedback. Use the discussion guide you prepared before your first day. These sessions are also an opportunity to build relationships, set realistic expectations and plant the seed for future support. Meet some of the people on the front lines too; your stakeholders can help you identify who. Visibility at ground level is an important indicator of engagement. See the systems that use your infrastructure in action.
- **Walk through:** Physically examine your resources and infrastructure. For example, take a walk in the data center and the network operations center with their leaders. Question practices for capturing asset data and how anomalies in the asset data are identified. What does "good" look like, and how are trends identified and tracked? These early observations will provide snapshots into the typical culture and working practices in the organization, rather than what's on paper.
- **Direct report meetings:** Invite your direct reports to individually meet with you to run through the inventory of their team. Establish that you wish to understand their team's roles and responsibilities for I&O products and services. Request they begin by presenting a team overview that first shows the number of IT resources in the team, any critical roles, and major staffing concerns. Also use these meetings to determine which resources will assist in leading efforts to help execute on strategic priorities.

**Assess the current state and learn about the past by reviewing records:**

- **IT strategies:** Pull the latest iterations for important topics such as cloud and DevOps, and look for business strategy alignment.
- **IT policies:** Review IT policies and IT governance documentation, focusing on what these articles appear to intend for the business overall, as well as the way they directly affect your team and your customers.
- **Financial performance:** Does the team meet its financial objectives? Do team members have effective processes for tracking actual results to both plan and forecast? Are they managing in terms of expenses and assets, supporting procurement regarding IT infrastructure or support contracts; or do they manage in terms of services or products and platforms?
- **Business model:** Meet with financial stakeholders and understand how budgeting and forecasting are done, how I&O is funded, and how chargebacks are performed.
- **Planning documents:** Review the organization's contributions to the annual planning cycle. Does the cycle reflect the needs of the organization and stakeholders? Is it of value or simply checking a box for providing content? Is the team on target to meet upcoming commitments for submission?
- **Project status:** Evaluate the status of critical projects that are sponsored by or dependent on I&O. Use high-level dashboards to develop an overall picture. Drill further into the most critical/at-risk efforts. In terms of checking the effectiveness of project and portfolio management (PPM) practices in I&O, do a quick and concise study of past project metrics. For example, what percentage of projects have failed to deliver intended outcomes, and what percentage of projects had cost/time overruns and why? The answers will provide insight into the I&O organizational culture, as well as its ability to deliver within budget and time constraints. Consider sitting in on key project meetings to see how they are run, how issues are addressed and where collaboration opportunities may exist.
- **Risk and compliance:** Leveraging external and internal audit reports and resources, and evaluate outstanding issues. Have appropriate reviews been conducted? Do significant gaps exist? Are findings being appropriately addressed?
- **Frontline support:** The IT service desk is the window into IT for many organizations, and IT may be judged entirely by service desk performance by a large portion of the enterprise. Evaluate the effectiveness and efficiency of current IT support to include user satisfaction levels. Issues at the IT service desk can be a source of inefficiencies and customer frustration.
- **Inventory existing I&O metrics:** Create an inventory of current I&O metrics, sources and uses. This should also include sample process metrics (such as mean time to repair [MTTR], mean time between failures [MTBF], recovery point objective [RPO] and recovery time objective [RTO]) as per the SLAs that are available internally or from external service providers. Be sure to get metrics from levels below and above yours to ensure alignment.
- **Identify metrics gaps:** Review the inventory of I&O metrics and identify what is missing. Is all the information available to make appropriate asset and service decisions? Have audits or other assessments previously identified gaps in information?

- **I&O team reporting:** Review existing I&O team reporting. What do the teams use today to communicate their status, successes and needs?
- **Review IT security expectations:** Learn all that you can about when, where and how established IT security policies and processes affect I&O. Explore highly visible aspects such as recent audit failures and patching status — these may require immediate monitoring. Remember, security is usually top of mind for the CEO and CIO, and forms part of the responsibility of everyone in IT at some level.

### **Assess and act on your I&O organizational management maturity:**

- Assess I&O maturity using the “IT Score for Infrastructure & Operations” online tool by having your direct reports take the I&O IT Score assessment.
- Consider carefully how to share the results of your IT Score with the team or your management. A new I&O leader coming in and being perceived as saying, “You were doing this wrong in the past,” will likely not gain team support and may upset individuals. Either way, focus your team and management on the positive potential impact and value that the team can achieve by concentrating on business outcomes.
- Identify a target maturity level to achieve in the short term (less than one year) and the long term (one to three years) — for digital business that is I&O IT Score Level 3.
- Begin ideation on how you could build the capabilities needed to improve maturity.
- Assess the lessons learned from time spent with your team to identify whether critical skills and behavioral gaps exist. Be mindful that you may need to create new positions, eliminate old positions or move people around.

### **Communications in the Assess Phase**

The key to communicating in the Assess phase is gaining the trust of key individuals so they will share information and offer their own candid views. To achieve this, be open, impartial and forthright concerning the information you have and your views.

**Update your elevator pitch:** Now you are more familiar with your new role, develop a brief business-outcome-focused statement (30 seconds or less) to deliver to key decision makers at a moment’s notice. Your pitch needs to be consistent, easily understood and repeatable. For example:

*“We are focused on delivering high-impact products and services. A good day for us is when our customers achieve their targets using IT services that come in on budget, on time and at the quality levels we agreed on.”*

**Follow up on the listening tour:** Summarize your discussions with your boss, your key findings to date and the priorities that grow from these findings. Use this session to gain consensus and to determine how the team should go about rounding out the view of I&O. This may entail assigning staff members to research an area (such as recurring, but intermittent downtime). Conduct a few



follow-up, fact-finding meetings during a period of less than a month. Use the results of these meetings to document your findings and set priorities. List the projects or initiatives you are likely to need to undertake to address those findings.

**Meet with vendors:** Extend communications to major strategic vendors to set the tone of your expectations, and to ensure support for what they will need to do for you in the next 100 days and beyond. Try for at least a one-hour briefing with key vendor personnel and team members who primarily deal with that vendor. Discuss with the team if there are already thoughts about other vendors (for example, selecting a vendor that can more broadly deploy hyperconverged solutions where three-tier architecture is currently delivered), or even different delivery models (for example, moving data to the public cloud instead of vaulting it with physical media).

**Review key assessment findings with your manager:** Take the opportunity to review your assessment findings as an important validation check before issuing wider communications. Although you may feel you are 100% correct in all your findings, there may be important information that you were not made aware of that you need to enhance your assessment. Have this discussion prior to wider communications with your team about assessment findings.

**Report to management:** Finish the Assess phase with a meeting with your reports and management team and other key executives to update everyone on your progress. Bringing key staff members in your organization to the table sets an important early tone in your overall management style. Communicate the accomplishments of the team during the past 30 days, as well as any significant items that did not progress as planned. End with next steps, and set a schedule for updates.

Through your Assess phase you may identify an emerging need to address concerns with specific individuals, particularly if your 100-day plan will likely rely on people who are closely associated with perceptions of failure. Now is a good time to discuss immediate options with your line manager. Focus on achievable, positive adjustments that the broader team will likely embrace so that you can focus on delivery in your 100-day window, and reduce the risk of short-term conflicts that disrupt your plans. For example, assign someone responsibilities in a different area to reduce conflict with others.

**Wider communication:** Lastly, have an “all hands” meeting of your entire team including individual contributors and contractors as appropriate, to communicate findings, projects/initiatives and next steps. Be sure to thank those that have supported your efforts so far, showing that you value their individual efforts and their contributions.

## Resources for the Assess Phase

### Gartner Research and Tools

- [Gartner ITBudget](#): This tool provides a comparative analysis of IT spending and is especially useful for gauging the relative spend mix dedicated to run, grow and transform.
- “IT Key Metrics Data 2019: Index of Published Documents and Metrics”: Outlines other resources helpful in assessing your IT budget results.



- “IT Score for Infrastructure & Operations”: This online tool assists IT leaders in assessing I&O maturity levels through a structured self-assessment process.
- Contract reviews: New leaders often face urgent contract renewal situations to “keep critical systems running.” New I&O leaders should not be constrained. Get help from your sourcing team and leverage Gartner contract reviews. Beware that even signing off on a maintenance renewal may be locking you into a current vendor, infrastructure technology, or a packaging, pricing or delivery model that is not in line with your enhanced I&O vision.

## Other Suggested Resources

- **I&O employee engagement surveys:** To assess the work environment for employees enterprisewide, many organizations leverage employee engagement surveys. This data is often obtained from your HR department for a subset of the overall employee group, such as I&O.
- **Contract inventory:** Through IT finance or sourcing, take an inventory of the major I&O sourcing agreements for hardware, software and services. Preferred data will identify technology providers, origination dates, termination dates, renewal dates, approximate financial scales and the internal I&O resources responsible for administering the agreements. The absence of this information can signal an immediate need for potential improvements in organizations striving for cost reductions. Without a process to actively manage and optimize agreements, I&O teams lose leverage and often process contract renewals with little oversight or, worse yet, expose themselves to being more at risk of any vendor audits.
- **Satisfaction and SLA performance metrics:** Examine performance metrics being used at the service and customer levels. Do they indicate or align with known problem areas?
- **Audits and assessments:** A deeper assessment following the use of Gartner’s I&O IT Score may offer additional insights and findings to drive future actions. For example, if IT controls are a major issue due to the nature of your enterprise, an external COBIT assessment may be warranted to provide additional validation or more-targeted recommendations.
- **Essential planning documentation:** Request the latest strategic and operational plans, current planning timeline and related reports. Ask your key advisers to alert you to new content sources.
- **Financial materials:** The performance of the I&O team, including its financial results, is now your responsibility. Request whatever material is available on the actual-to-plan expense and capital-spending activities. Request any forecast information available.
- **Review what has been done before:** Look at the strategic initiatives of the past two or three years to see what the focus and the outcomes were.
- **Look for success:** Identify successful initiatives or leaders. Also identify what led to their success in the organization, and what lessons you can learn (or, even better, go ask them).

## Plan Phase (Days 15 to 45)

The Plan phase synthesizes the Assess phase information into the five areas of focus, transforming all you've learned during your first weeks on the job into a blueprint for action. You also need to continue building relationships and credibility, and demonstrating progress.

### Target Outcomes for the Plan Phase

The tools and advice in this phase will help you:

- Establish the three to five top priorities to focus on.
- Qualify top priorities with high-level objectives, designated owners and broadly defined action plans with timelines for next steps.
- Align key stakeholder support.
- Communicate your leadership vision.
- Start actions aligned with the identified priorities.

### Actions for the Plan Phase

**Develop and plan for marketing your brand:** A brand is a commitment that sets expectations in a memorable way — think about how you want to be perceived and known. This is, in essence, a definition of you and your capabilities and experience.

**Produce your options:** This is the time to decide what actions to take, based on the input you've received and the records you've reviewed:

- **Distill stakeholder discussions to determine business priorities:** Use the stakeholder discussions and other assessments you did to identify a set of business priorities for I&O. Of the many possible areas, which are of greatest importance to the organization? Remember: this activity is not aimed at determining the actions to take, but at identifying the areas of highest value from the business stakeholder perspective. Examples include resolving urgent production issues, quality and performance challenges, compliance mandates, and innovation challenges.
- **Consolidate assessment findings:** Develop a list of potential improvement areas from all the Assess phase reviews undertaken so far (such as financial, planning, risk and compliance, and frontline support). Rank each item against the business priorities you just identified, factoring in the level of effort required for improvement.

**Rank I&O core competencies:** Using the consolidated assessment findings, IT Score for I&O (ITSIO) results, brainstorm sessions and other inputs, the IT leader should identify a set of I&O critical core competencies for near-term focus. Potential competencies the leader and their key advisors identify could include:

- Process management
- Talent management — skills forecasting and requirements management

- Financial and business management
- Decision-making and prioritization techniques
- Managing ongoing service delivery
- Managing project delivery
- Cloud management and brokering
- Continual efficiency improvement
- Technology leadership
- Relationship management
- Customer intimacy — managing change

### Focus on Five

Using outcome priorities, review findings, brainstorming session outputs and competency rankings, identify five areas for action planning within the 100-day period:

- **Select action area leads:** Identify leads for each of the five action areas and solicit their personal commitment for near-term improvements and action plans. Work with these leads to refine their proposed plans, such that they are realistic, yet will yield visible and tangible results.
- **Champion two areas:** Based on the lead commitment, plan feasibility and potential business impact, place your personal support behind two areas for delivery within the 100-day time frame. Other leads may be given the “go ahead” to proceed and offer additional results to later leverage as 100-day “wins.” However, do not place your personal reputation on the delivery of all five efforts. Included in these extended efforts may be items that are meaningful to the internal staff based on their feedback. Addressing an internal issue can demonstrate concern for the team and strengthen support for progress on more-external impact items. Be careful to select only areas that are deliverable within the targeted time frame.
- **Commit your calendar:** Schedule regular sessions to ensure that the two areas you champion are on track and will deliver to your personal commitment. Other leads can also be supported. However, the two selected areas deserve special attention and access to you because they will either make or break your long-term I&O leadership reputation.
- **Remember — do not allow this plan to compromise your ability to achieve your probationary targets.** Remember to factor in the work needed to achieve your probationary targets throughout your planning. Do not inadvertently compromise your probationary targets with other plans unless this has been explicitly agreed on with your manager.

### Socialize the Plan With Key Stakeholders

Reinforce your relationships and make final plan adjustments by previewing your plan with selected stakeholders. For those favoring items not on the immediate action list, develop your rationale as to

why items were selected, and indicate your future thoughts about addressing their priorities. Use your I&O vision to set a context for your near-term action plan and the overall future direction. Solicit their visible support and involvement for your plan and your vision for I&O. Remember, your line managers are key stakeholders, who will likely need to communicate your plans to their direct reports and other team members; so ensure you provide clear communication to enable them to do this effectively.

## Communications in the Plan Phase

### Update Your Leadership Vision

All the activities accomplished to this point should enable you to refine your initial leadership vision to begin to build the longer-term perspective for the I&O organization. The areas in your plan of action must solidify the first steps needed toward this broader, compelling future vision for I&O.

**Enlist the ongoing support of your team** and other stakeholders as you communicate this future vision. The Plan phase is when you really need planning-oriented professionals' time. Present your management options: "We can accomplish x by y. However, with additional resources, we can also do z, but we will need these additional resources." Communicate clearly what resources you will need, and don't get into the trap of promising to do too much with too few resources. I&O organizations are typically shorthanded when it comes to project managers. Suggest augmenting with outside consultants or defer the projects.

Don't claim to have all the answers on how the organization will get there. Everyone you discuss it with will contribute to the journey. Produce a vision statement to support your work. The vision should be crisp and strategic, with targeted business and organizational goals aligned with it, rather than simply technical goals. For example, "I&O will build a landing zone in public cloud for all the virtualized infrastructure assets within one year" is not a vision statement. However, "I&O will be a world-class IT function bringing a competitive advantage to the organization by enabling and improving key digital business outcomes" is an example of an effective vision statement.

**Build on communications** from the Assess phase. Task project managers with detailing plans. Meet with your manager and other key stakeholders to review the plans and approve them. Then hold an "all hands" meeting to communicate the plan. Use the quick hits to boost morale and show progress beyond planning to establish I&O as a "can do" organization.

**Challenge the patterns of your predecessors** by committing to reduce the demands on your team for it to undertake low-value work. This sets the tone that you are not just adding to the tasks you are asking others to complete, and that you are focused on delivering high-impact value in a practical and pragmatic way. Sponsor the automation or elimination of a low-risk task to reinforce your commitment to working smarter, not harder. Be careful, however, not to make change for the sake of making change. Ensure that the challenges you take on really drive added business value.

## Resources for the Plan Phase

### Gartner Research and Tools

- “IT Score for Infrastructure & Operations”: Gartner’s IT Score for Infrastructure & Operations online identifies I&O strengths and weaknesses using a self-assessment.
- “Embrace an Adaptive Program Management Life Cycle”: This research provides program and portfolio management leaders with a context for complex programs. In it, the key characteristic is a people-led, iterative approach, with a clear vision of the end state and a strong program team.

### Other Suggested Resources

- **Internal project management resources:** Leverage project management office (PMO) resources to assist with administrative support. Using a project manager is not typically recommended for short-term deliverables because it may add administrative overhead and detract from the perception that the new I&O leader is driving new outcomes.
- **Existing strategy documents and budgets:** Study these to gain a good indication of the structure and format used for strategic planning in the enterprise.
- **Templates and processes:** Many organizations have existing templates and processes developed. If they’re available, leverage them.

## Act Phase (Days 30 to 80)

The Act phase clearly demonstrates your personal leadership capabilities by delivering on your probationary goals and a couple of high-business-impact areas that would not have occurred without you. It also provides a platform for expressing your long-term vision across a broad stakeholder group. This phase may also offer deliverables beyond the two to which you’ve personally committed, enabling you to exceed your commitments, thereby bolstering your personal leadership reputation for delivering results.

## Target Outcomes for the Act Phase

- The implementation of your action plan and delivery of actionable recommendations to address at least one key business outcome to demonstrate quick success.
- A list of behavioral changes that you will focus on to improve the interpersonal effectiveness of staff members, as necessary.
- A description of the formal (such as governance) and informal mechanisms that enable progress toward the business outcomes you intend to implement.
- A few key training programs to be delivered quickly, in case the maturity assessment reveals the lack of some critical skills necessary to execute the plan.

- A measurement plan focused on both the supply and demand sides (adjust your actions or modify your metrics to produce the desired results).
- The final set of 100-day quick hits (communicate the actions you are taking and the business results they are achieving).

## Actions for the Act Phase

### Get Started

- **Deliver an actionable recommendation:** From your discussions with key stakeholders and sponsors, you will have identified the shortlist of key business outcomes that the organization is driving, and that I&O can improve in terms of delivery or functionality.
- **Announce any organizational adjustments:** Based on your assessments of skills and behaviors, and accounting for the guidance already provided to you by your manager on this topic, work with HR to make these changes as protocol dictates.
- **Kickoff initiatives:** Conduct a kickoff session with leads, teams and key stakeholders to set scope, mobilize work and demonstrate your direct support. The leads should facilitate the meeting, but you must play a prominent role in setting context and providing resources.
- **Empower leads:** All I&O resources, and in many cases other IT resources should understand that the leads for these efforts are acting on your behalf and that you expect their full support. Make your ongoing role clear to the teams involved, such as being available to provide directional guidance and remove roadblocks.
- **Ensure/impart necessary skills quickly:** Ensure that the resources have the right skills, so that the targeted early wins are not at potentially high risks of failure. If the maturity assessment reveals significant skills gaps, especially in areas in which actions are planned, then quickly identify two or three training programs. Set measurable pre and post-training objectives, and empower team leads to deliver. For example, the maturity assessment shows that most of the key support processes do not exist or are in states of low maturity. One of your priorities is to improve business users' experience with IT operational process responses. So, you must quickly get your team leads trained on agility approaches, DevOps and product orientation. Consider a partner to help with rapidly accelerating maturity, particularly if you have minimal support from internal learning and development professionals.

### Track Progress

- **Track status:** You must monitor progress on the selected initiatives regularly. One option is to include this as a regular standing item for one-on-one meetings.
- **Remove obstacles:** The I&O leader should be committed to the delivery of the elected effort and be available to approve changes, add resources and remove obstacles as required. Typical obstacles include budgetary constraints, lack of skills, lack of staffing/bandwidth, resistance to change and lack of commitment from team leads. Target each potential obstacle with a potential resolution. For example, when there are significant budgetary constraints, bring down

your scope from top five to only the top two or three, but ensure the best results on these. More-difficult obstacles are the softer ones, such as resistance to change. These will require building teams of dedicated change agents (or champions) who promote the right behavior.

## Capture Results

- **Document results:** Capture quantitative and qualitative results from each effort, picking up on relative improvements that provide tangible support for the actions underway. Strong anecdotes, I&O employee or user quotes, and other qualitative indicators will amplify the quantitative results. Combined, they create a compelling story to demonstrate impact and propel future efforts, and can be a valuable part of an I&O marketing plan. This information will supplement your Measure phase, so collect it.
- **Review outcomes:** Review your target outcomes from the Act phase. Remove completed or no longer appropriate outcomes. Add others that have emerged as essential. Complete those that are required and are still outstanding. Shift others, as appropriate, into the next phase.

## Communications in the Act Phase

The initial I&O session that kicks off this phase entails a broader cross-section of your team and may be an all-hands meeting. Use this communication opportunity to get everyone focused on, and thinking about, how to achieve the plans. Actively seek questions and feedback to gauge understanding and uncover potential future trouble spots.

The key here is focusing on a set of “must do, must succeed” plans — no arbitrary early deadlines, just those that really need to be implemented in this time frame.

## Offer updates for each of the action plans (and any new priorities):

- What you’ve done so far
- Interim results — don’t be shy; highlight your wins, and celebrate with the team for positive reinforcement
- Where to go from here
- Who to contact
- “What I’ll need from you” (and when)

**Engage your stakeholders:** As you move through delivering business outcomes, engage your stakeholders to ensure that your I&O engagement plans are on track:

- Create opportunities to communicate your message and get stakeholders’ involvement in key decisions.
- Check in with your stakeholders on the status of business outcomes. Be open and honest in your discussions with stakeholders on issues and challenges, and enlist their help to resolve them in partnership when needed.



## Resources for the Act Phase

### Gartner Research and Tools

Once you have your target action areas, turn to Gartner's rich body of research for specific tools and advice. Our online portal includes hundreds of research documents on selecting vendors, using best practices for policies and programs, and managing the I&O organization. Some useful research includes:

- "Top 10 Emerging Trends Affecting Digital Infrastructure and Operations in 2019"
- "How to Kick-Start an I&O Innovation Center"
- "How to Build Digital Dexterity in Infrastructure and Operations"
- "Talent Management: Dealing With Silos in a Hybrid Infrastructure World"

### Other Suggested Resources

- **IT and management consulting resources:** When internal resources don't exist to drive action in the targeted areas, seek supplemental resources from external providers. Define the scope and deliverables so that desired tangible outcomes are achieved.
- **Existing IT providers:** Vendors seeking to establish positive early relationships with a new I&O leader may be more flexible in offering assistance toward addressing your targeted objectives. Ensure that these activities don't become sole-sourced marketing exercises.

## Measure Phase (Days 45 to 100)

The Measure phase provides evidence that your enterprise can have confidence in you, based on results. This phase overlaps significantly with the Act phase. This overlap provides the opportunity for feedback to adjust the Act phase activities and deliverables, thereby ensuring that they produce the desired tangible results. Collect plenty of "before and after" information to ensure that everyone can see the progress your team has made. From earlier phases, baseline information can be leveraged in the Measure phase to gauge near-term and long-term progress. For example, the initial ITSIO results provide a baseline metric that the team can use to evaluate progress toward the maturity objectives.

## Target Outcomes for the Measure Phase

- Demonstrated tangible and meaningful improvements in selected areas
- Recommended future metrics improvement opportunities



## Actions for the Measure Phase

### Set Metrics

- **Track and review metrics with key stakeholders:** Most consumers of I&O output care about precisely two things: reliability and responsiveness. Be sure to have demonstrated these basic I&O functional requirements before moving to more advanced conversation and plans. Metrics are also an important part of your discussions with key stakeholders, including your direct reports and individual contributors. For IT peers and business-unit customers, your aim is to use a few key metrics, such as the business outcomes that interest them most, to demonstrate the value of the I&O function.
- **Focus on continuous improvement:** Leading I&O functions constantly adjust to ensure that they are adding business value to their organizations.
- **Establish success criteria:** For the targeted areas of improvement, select meaningful success criteria to evaluate progress. Collect baseline metrics and monitor results. Leverage specific, measurable, actionable, relevant, time-bound (SMART) objectives as much as possible, while establishing and communicating the success criteria and target improvements.
- **Obtain customer feedback:** Capture succinct feedback on the impact your actions had for your customers to demonstrate the true business value of what your actions delivered. This feedback is vital to help your team connect the value of their contributions to real customer outcomes. Keep in mind that gathering feedback is far more than simply doing a survey. Consider alternate channels such as focus groups to get additional perspective.

### Assess Areas for Improvement

- **Recommend improvements:** Having inventoried I&O metrics and identified gaps, create a set of recommendations for future I&O metrics and reporting. Consider the existence and need for internal operational metrics and external stakeholder metrics. The recommended improvements should be aligned to the priorities established in the Plan phase. Are there opportunities to eliminate low-value, low-impact activities to enable resources to focus on more meaningful and action-oriented information?
- **Consolidate results:** Validate and combine the documentation of results from the selected areas for improvement. If other initiatives have also yielded results beyond the two selected for current focus, add those results to 100-day results.

## Communications in the Measure Phase

There are two mantras for the first 100 days that go hand-in-hand: “Communicate, communicate, communicate” and “Measure, measure, measure.”

Ideally, you would like to establish a benchmark on Day 0 (“how things were before I got here and [re]built the team”). However, experience shows that there are too many other pressing tasks in the first 60 days. Early in this phase, you must decide what metrics will be reported. At approximately

Day 60, you need to establish a benchmark — the starting point. As discussed previously, the key here is how comprehensive you want the benchmark to be.

**Report metrics to your management:** This should consist of regular, agreed-to cycles in a common, agreed-on format at an agreed-on level of detail. Improvements in metrics are key measures of success and demonstrate your accomplishments. Review the metrics with your team. Set expectations that they should have commentary on them, and provide insight.

**Highlight early wins, successes and challenges:** Schedule meetings with your manager, team leaders and key stakeholders to gather their thoughts on the progress made and challenges encountered during the first 90 days of your tenure. Collate the findings into a first-quarter status report. Report on only what is relevant to your key stakeholders. Don't rely on just numbers, but rather interpret the metrics for your audience and provide recommended courses of action. Spend some time trying to anticipate their responses. The difference between the way they respond and your anticipation represents an area where you need to devote more time to stakeholder management.

**Make use of dashboards:** Consider reporting metrics via a web portal. That way, the level of detail desired by staff members can be made available without the need to create multiple reports. Automated dashboards are a key staple for management team reviews (see “Toolkit: How to Build Your I&O Business Value Map”).

## Resources for the Measure Phase

### Gartner Research and Tools

- “Kick-Start Your IT Value Story With Metrics That Matter”: A business value dashboard cannot be generated in a vacuum. Rather, we recommend developing a prototype and reviewing it with the appropriate stakeholders.
- [“Reporting the IT Organization’s Performance”](#): Demonstrating that IT is working on the right things in the right way, and delivering real business value, is critical to an I&O leader’s credibility.

### Other Suggested Resources

- **Industry best-practice frameworks:** ITIL, COBIT and other industry frameworks offer guidance for I&O leaders. These frameworks and their practitioners offer assessments and industry information for supporting measurement and comparative analyses. Remember these are tools to service goals and drive business value — not the ultimate objective.
- **In-house metrics and measures:** Many organizations have developed their own sets of metrics and measures. Use and extend these where appropriate.
- **Scorecards and benchmarks:** In most cases, a good graphic is a great way to communicate a metric or KPI. Reach out to a design team if you have one, or use in-house tools (for example, Microsoft Excel has great dashboard resources and templates).

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

“Leadership Vision for 2019: Infrastructure and Operations Leaders”

“Adopt a New I&O Operating Model and Organization Design for Digital Business”

“Take These Five Steps to Prepare I&O for Digital Business Platforms”

“Build I&O Staff Talent to Support Bimodal, DevOps and Cloud”

“Digital Platforms Need Programmable Infrastructure”

“How to Be a Successful I&O Leader in the Era of Digital Business”

“Deliver Digital Business Results by Boosting Workforce Digital Dexterity”

“Every Organization Needs a Digital Platform Strategy”

“Three Things I&O Must Change to Become a Valued Service Provider”

“The First Step in Delivering an Agile I&O Culture Is Knowing Your Target State”

### Evidence

<sup>1</sup> 2018 Gartner IT Service Delivery Impact on Business Workers Survey: A total of 614 respondents participated, with representations from all industry sectors (public and private) in North America and Western Europe. Respondents, all in non-IT roles, were asked to prioritize five service delivery factors (reliability, assurance, tangibles, empathy and responsiveness). Relative to the other four, the reliability statement is twice as likely to be preferred than the other characteristics, and the responsiveness statement is more likely to be preferred than the other three. These two factors alone account for 65% of IT customer satisfaction from the business (reliability 40% and responsiveness 35%).

### Note 1 Our Assumptions About Your Role

This research makes core assumptions about the characteristics of a person entering an I&O leadership role. We have named our sample person “Chris,” an amalgam of client experiences that contributes to our 100-day scenario:

- Chris is new in the role, and reports to the CIO or most senior IT leader.
- Chris works in a large, leading-edge enterprise, and has started work in an I&O team with a wide range of maturity.
- Chris was hired or promoted into the role more because of a focus on business outcomes, and less for technology skills.

- Business feedback makes Chris realize the need to take a fundamentally different approach to I&O in order to maintain the support of IT and the business. Chris needs to restart or renew the I&O organization.
- Chris is tasked with developing and managing the digital business strategy for I&O at the direction of his CIO.

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