Toolkit: Workshop for Building a Strategic Technology Map to Support Your Future University

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This Toolkit enables higher education CIOs and IT leaders to run a collaborative workshop with key stakeholders. In three hours, a visual strategic plan can be built by identifying the institution's "business model" and building the corresponding Strategic Technology Map.

When to Use

Speed Up IT Strategic Planning in Higher Education

This Toolkit is a practical guide for using the Gartner higher education business model scenarios and the Strategic Technology Map as tools to collaboratively set the high-level strategic direction in less than three hours. The Toolkit is based on the accompanying slide deck and handout, with the text below walking through how to use the two collaboration models in a workshop setting.

The Toolkit provides the concrete results of at least:

- One PowerPoint slide of the institution plotted on the higher education business model map

- One PowerPoint slide of the corresponding Strategic Capability Map or Strategic Technology Map

These slides create a common memory and methodology for the key stakeholder group, allowing for more frequent revisits and readjustments of the IT strategy than the traditional document-based strategic planning allows.

The key goals of this workshop are:

- To attain a common understanding among key stakeholders of where the institution is, and where it is headed, relative to competitors in terms of its "business model"

- To set expectations on where IT can be strategic in relation to how focused the business model of the institution is

- To draw up a map with inherent relative ratings of strategic capabilities (or technologies) that support the current and future institutional business models

- To give the CIO an opportunity to listen to and understand how key stakeholders think about technology-related strategic capabilities in relation to the mission within the big picture of the institutional business model

This Toolkit builds on experience from over 25 workshops conducted by the author. The Toolkit is not a replacement for a full strategic planning process but is a component of it, and we recommend that you reach out to Gartner to get support from the many frameworks and components that Gartner provides.

How to Use the Toolkit

0. Identify the stakeholders you need to work with.

1. Run the workshop — suggested agenda and timing:

    1.1 Introduction and purpose of the meeting (about 30 minutes).

    1.2 Current institutional and IT strategic objectives (about 15 minutes).

    1.3 Introducing the higher education business model scenario (HEBMS) framework (about 30 minutes).

    1.4 Where is the institution in the HEBMS — now and in the future? (about 30 minutes).

    1.5 Introducing the Strategic Technology Map and its relation to the HEBMS (about 30 minutes).

    1.6 Building the current-state Strategic Technology Map — group exercise (about 15 minutes).

    1.7 Building the future-state Strategic Capability or Technology Map — breakout exercise (about 30 minutes).

    1.8 Building the future-state Strategic Capability or Technology Map — bringing it together (about 20 minutes).

    1.9 Wrap-up or next steps (10 minutes).

0. Identify the Stakeholders You Need to Work With

The ideal stakeholders for this workshop are the president, the president's cabinet and the deans. The ideal number of participants ranges from 15 to 25. Second best is to work with a selection of key roles present on campus — for example, representatives of the president's cabinet, deans, senior administrators, faculty and students. A third option is to focus on a specific user group, such as faculty, administrators or students. The stakeholders you can get to the workshop will, to a certain extent, determine the context of the meeting, but it is actually preferable not to prepare the audience too much to get at their instinctive opinions about the institutional business model and supporting capabilities or technologies (as opposed to getting prepared "statements" if they have time to prepare).

1. Run the Workshop

Below is a list of the minimum agenda items in the workshop and estimated time for each agenda item. The time estimate is based on a group of about 15 participants in total and three groups in the breakout session. More participants and especially more breakout groups can add to the total time or will require strict time management. It is preferable to take more time to allow everyone to have their say. Table 1 (at the end of this document) shows a shorter run sheet than the one below.

In addition, we strongly recommend designating a facilitator and a scribe for the workshop. The facilitator (preferably someone neutral to both sides and trained as a facilitator) will allow the CIO to fully engage, while the scribe can capture the meeting dialogue.

1.1 Introduction and Purpose of the Meeting (About 30 Minutes)

- Each person introduces himself or herself (if needed) and says a sentence or two about his or her expectations.

- The facilitator presents the purpose of the meeting. This is sometimes framed as "helping them help the CIO help them," and allows the CIO to listen to how participants reason in their own words about the institution's business model and the capabilities or technologies that they rank highest for institutional success.

- This agenda item uses Slides 1 to 4 in the accompanying deck. Slide 0 is the facilitator's run sheet, and Slide 4 is an optional placeholder for extending the introduction as described below.

- At this stage, the handouts of the empty templates should be made available to the group (262152_wksp_handouts.pptx).

- The scribe should be present to capture the dialogue from the beginning.

If needed, this part can be complemented by a few slides on the need for strategic planning either from a change management perspective or from the perspective of IT impact on the institution and higher education as a whole to set the scene and hopefully create some urgency (see, for example, "The Expanding Education Ecosystem: A World of Choice"). However, such an agenda item can easily expand in time, which has to be accounted for within the total time frame of the meeting.

1.2 Current Institutional and IT Strategic Objectives (About 15 Minutes)

- The key sponsor of the workshop from the "business" or academic stakeholders walks through the current institutional and IT strategic objectives in two to six slides to emphasize that this workshop builds on existing strategic planning efforts. The workshop is not a sign that the institution is starting over, but to help with creating a common "big-picture view" to speed up the overall strategic planning process.

- Slide 5 in the accompanying deck is a placeholder for your institution's own slides.

1.3 Introducing the Higher Education Business Model Scenario Framework (About 30 Minutes)

- The facilitator introduces the Gartner HEBMS framework (see Figure 1) and walks through the four scenarios and their extreme characteristics to set the scene for the first exercise.

- This agenda item uses Slides 6 through 15 in the accompanying deck.

Figure 1. Gartner's Higher Education Business Model Scenarios
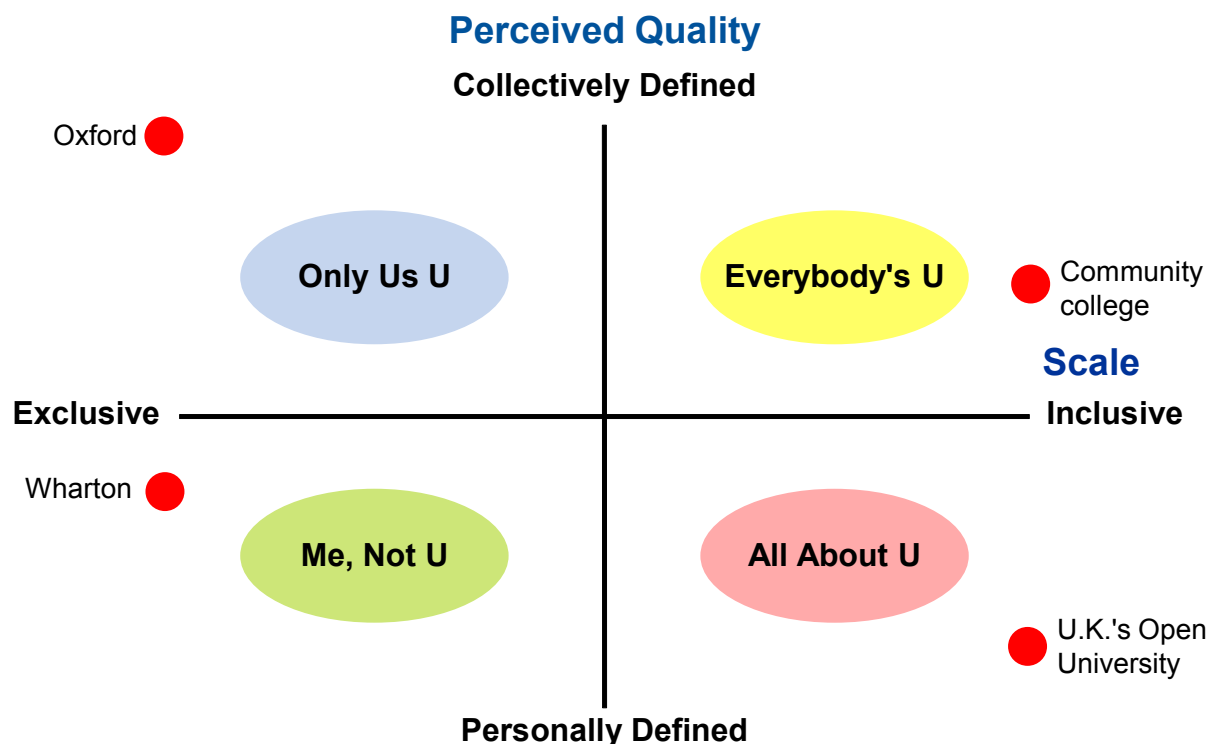
Source: Gartner (April 2014)

The Gartner HEBMS framework and the extreme characteristics of each scenario are explained in:

- "Introducing Visual Strategic Planning Using Four Higher Education 'Business Model' Scenarios and Strategic Technology Maps"

- "Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — Only Us U Focuses on Brilliance for the Market"

- "Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — Me, Not U Looks to Edge in the Market"

- "Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — Everybody's U Leverages Scale of the Market"

- "Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — All About U Seeks Speed to Market"

A video walking through all these scenarios, and their corresponding Strategic Technology Maps, can be viewed in the 2013 Gartner Symposium/ITxpo session "Executing on the Higher-Education Business Model Scenarios — Building Strategic Technology Maps."

1.4 Where Is the Institution in the HEBMS — Now and in the Future? (About 30 Minutes)

- This is the first exercise, and it is preferably done with the whole group — no breakouts.

- The facilitator brings up Slide 16 (see Figure 2) and exits display mode to document directly on the projector screen under the directions of the group, following the basics steps below.

- This agenda item uses only Slide 16 in the accompanying deck. Slide 38 is an example for the facilitator's benefit.

Figure 2. Gartner's Higher Education Business Model Scenarios: Exercise 1
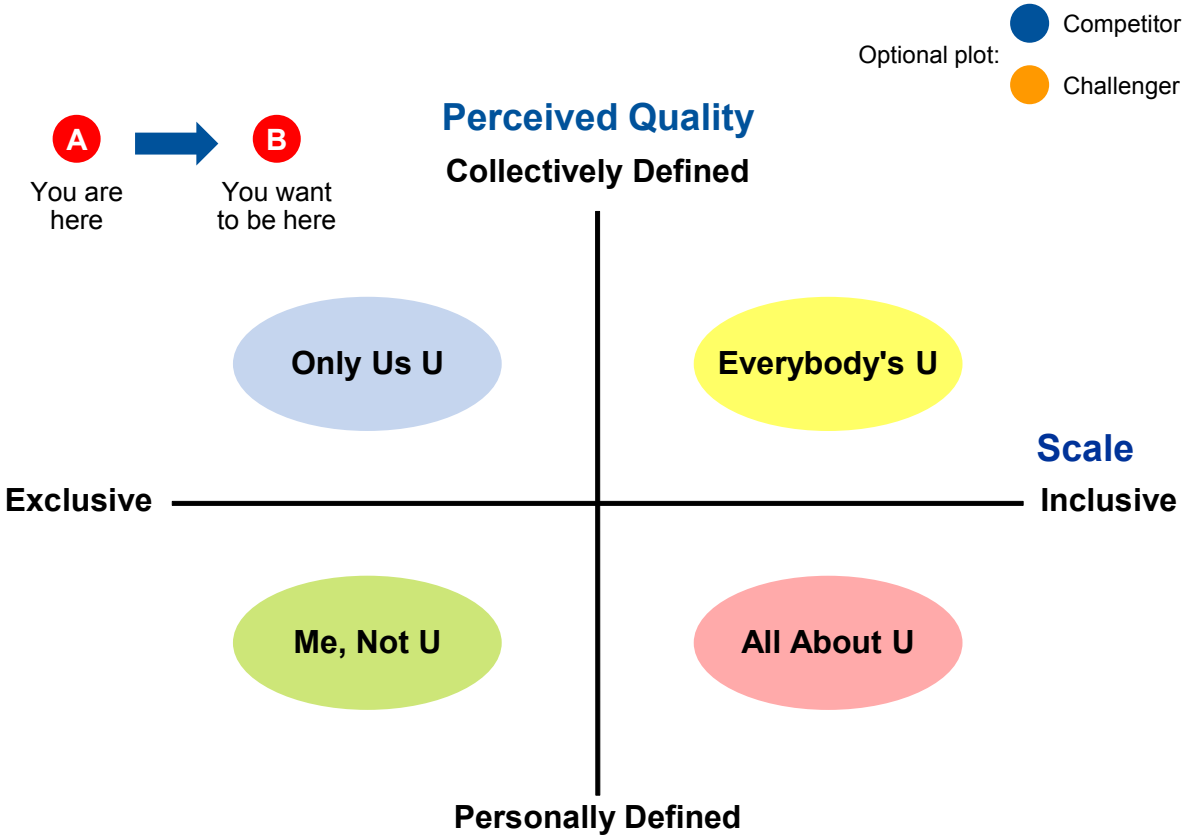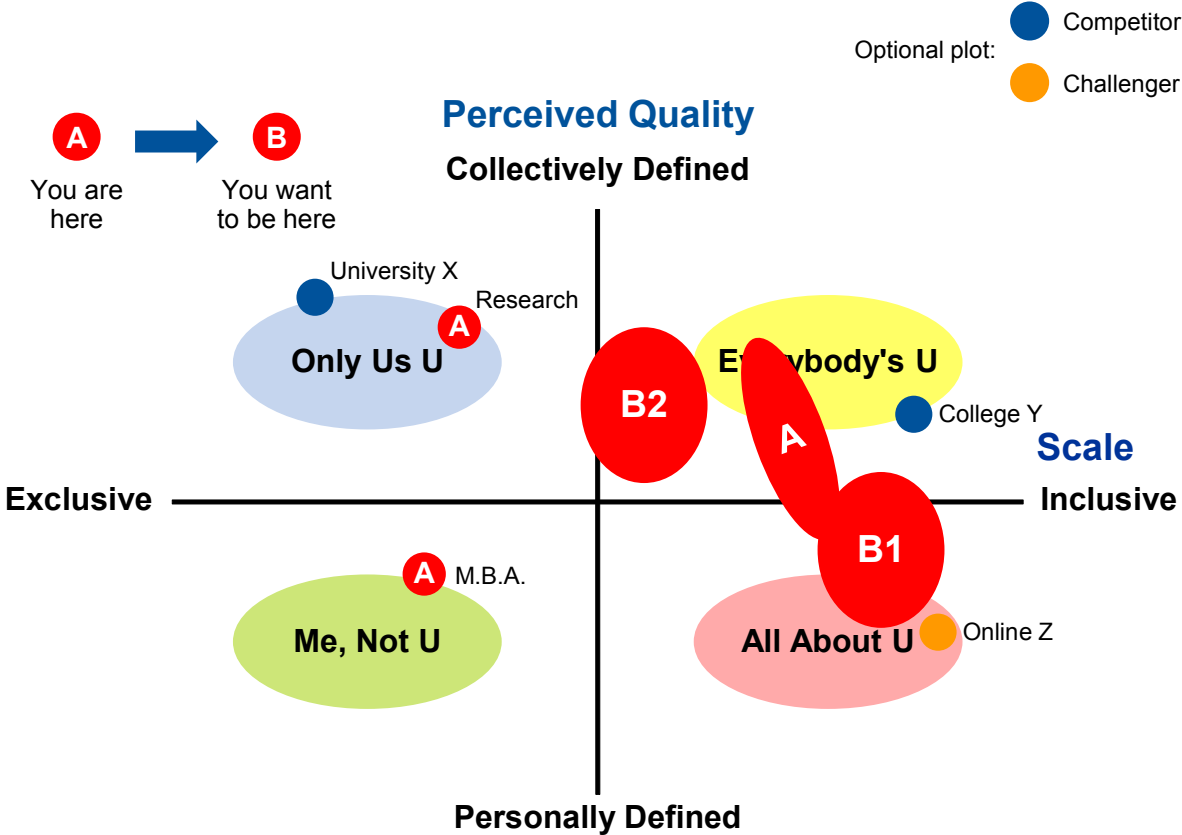

Source: Gartner (April 2014)

- Copy the red dot marked A (representing where the institution is today) in the upper left-hand corner of the slide, and place it according to the will of the group.

- Copy the red dot marked B (representing where the institution wants to be) in the upper left-hand corner of the slide, and place it according to the will of the group.

- Optional: If you want to refine the positions of A and B, it is often helpful to plot some competitors (copy the blue dot in the upper right-hand corner) and challengers (copy the orange dot in the upper right-hand corner). Competitors are institutions that are directly competing with your institution or parts of your institution — they are often institutions you want to beat. Challengers are institutions that are on a trajectory to catch up (and surpass) your institution or parts of your institution. In our workshops, we have found that, since the workshop participants know so much about their own institutions, it can be hard to pin down the institution's position (see the example in Figure 3). However, most participants have a more simplified view on competitors and challengers, making it a simpler task to pin them down. Prospective students and employees are more likely to have a simplified view, and this part of the exercise helps visualize the competitive landscape and focus the discussion, especially on the future state of the institution.

Figure 3 is a quite typical example of what the exercise can result in.

Figure 3. Gartner's HEBM Scenarios: An Example Outcome From a Workshop

**Your U?
From 20xx to 20yy**

Source: Gartner (April 2014)

The group often quickly identifies what the main quadrant for the institution is. In this case, it is Everybody's U. Next usually, an insight follows that the institution is not a single dot but rather a bigger "blob" that quite often has characteristics of one or more of the scenarios. In this case, A is a tilted ellipse with the center of gravity in Everybody's U but also an increasing element of All About U. At this stage, somebody usually points out that a few, often small, entities have different qualities from the main institution. In this case, a master's program (M.B.A.) and a Ph.D. research program were considered to be in Me, Not U and Only Us U, respectively.

At this point, it is beneficial to bring in a discussion of competitors and challengers to see if that can refine understanding of the institution's business model. In this case, the examples of a high-end national research "University X," a local competitor "College Y" and an international online institution "Online Z" helped move the discussion forward.

The next step is to identify a potential future state based on current strategic plans and intentions from the leadership. In this example, where the group was put together based on representatives of key roles on campus (in Step 0), there was an interesting disagreement on where the institution was really heading. A slight majority of the group thought that B1 (that is, a further focus on All About U) was the right path. A slight minority thought that B2 (a firmer focus on Everybody's U, with drift toward Only Us U) was the right path.

Outcome

The outcome of this exercise is, of course, to help the CIO understand the main characteristics and direction of the institution that the IT organization is tasked to support. More importantly, it is an opportunity to set expectations in the group. The larger the blob is and the more outliers that are found in the HEBMS framework, the harder the task is for the CIO to support the institution.

In fact, a result such as the one above could possibly result in new funding discussions for the outliers "A Research" and "A M.B.A." to decouple them from the task of supporting the institution's center of gravity or at least to de-emphasize the demands from often vocal representatives of such units in the mind of the president.

In this particular example where representatives of the institution did not even have the same view of the general direction of the future institution, obviously, the CIO will have difficulty coming up with a supporting strategy, thereby setting the CIO up for misalignments in expectations. The ideal outcome of this exercise is that the institution's leaders will clarify and communicate their strategic intentions in order for the CIO to fully support the institution. Finally, it is clear that the smaller the dots of A and B are, the better the CIO can support the institution.

1.5 Introducing the Strategic Technology Map and Its Relation to the HEBMS (About 30 Minutes)

- The facilitator introduces the Gartner Strategic Technology Map (see Figure 4) and walks through the four scenarios and their extreme characteristics to set the scene for the Strategic Capability Map or Strategic Technology Map exercises.

- This agenda item uses Slides 17 through 30 in the accompanying deck.

Figure 4. Explaining Gartner's Strategic Technology Map: Exploiting the Tension Between Organizational Efficiency and Personal Productivity
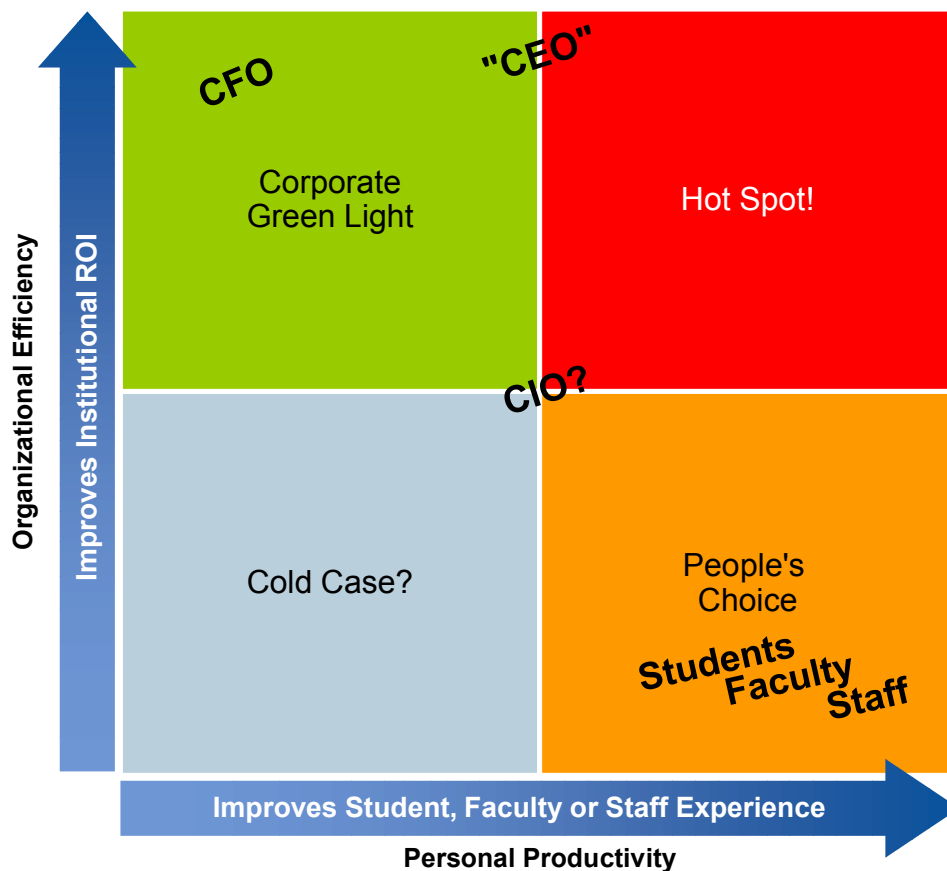
Source: Gartner (April 2014)

The Gartner Strategic Technology Map visualizes the technology needs that enable that particular business model scenario to be successful. In our version of this map, we emphasize the inherent need in higher education to balance organizational efficiency and personal productivity. Organizational efficiency focuses on cost-effective standardized processes to drive down the overhead (or administrative) costs of an institution and maximize any ROI from a collective point of view. Personal productivity focuses on individual researcher, teacher and student productivity to maximize the individual experience and satisfaction at the institution.

This version of the Strategic Technology Map has four quadrants (as shown in Figure 4):

- **Cold Case? —** Technologies that rate low on both axes, that are usually associated with infrastructure and that need another service built on top of it to be useful for the end user. These technologies are often sought only by the CIO but can be called "enabling" technologies if the right connection to meaningful end-user services can be shown.

- **Corporate Green Light —** Technologies that rate high on the organizational efficiency axis, but low on the personal productivity axis, and typically include administrative systems, such as finance systems and student information systems (SISs) that are appreciated by the CFO. Often, these technologies have a direct impact on administrative processes, enabling a low cost per transaction but are considered constraining by business unit end users.

- **People's Choice —** Technologies that rate low on the organizational efficiency axis, but high on the personal productivity axis, and are usually associated with consumer technologies and services, such as tablets, Evernote and Facebook, that faculty and students quickly take to as these technologies increase their personal productivity. If these technologies are not managed, they can many times increase risk and the cost of support, as well as disperse institutional information, making it harder for the institution to manage synergies. It often falls on the CIO to find a solution for these issues.

- **Hot Spot! —** Technologies that rate high on both axes. Here, we find technologies that are very new and display a competitive advantage in themselves (as long as the market penetration is relatively low) or, more often today, are combinations of technologies from different quadrants that display a win-win of capabilities. In the former category, we have, for example, lecture capture and retrieval, and in the latter, we have mobile campus apps that can display personalized data to students based on SIS information, such as grades.

Through our workshops, we have realized that, to get access to three hours with the president's cabinet and the deans, it is sometimes important to de-emphasize the technology aspect and emphasize the capability aspect of strategic planning. One clear benefit of a capability focus is that stakeholders who perceive themselves as not technology-savvy enough can contribute fully. Another key benefit is that it helps the group focus on the specific outcome of using a technology, rather than just stating, "We need iPads." The drawback of focusing on capabilities only is that the exercises below can be too abstract, not leading to enough tension in prioritizing, and offer less guidance to the CIO in devising actual services out of strategic technologies.

The middle ground is to try to focus on "technology-related capabilities" and allow participants to plot whatever they think represents a key capability, as long as they can explain to the rest of the group why they have chosen that particular dot.

The practical consequence for this Toolkit is that we have included both the Strategic Capability Maps (SCMs) and Strategic Technology Maps (STMs) for each higher education business model scenario (for example, Slides 26 and 27 for Everybody's U). It is up to the CIO to decide what focus the workshop needs to have, depending on the group the CIO wants to involve.

For example, a technology-savvy group of professors and students might want to go directly for the STM, while a more strategy-focused group of deans will prefer an SCM approach. There is, of course, the option to do, first, an SCM and then an STM, but that will increase the workshop time. Our experience is that it is not easy for the participants to separate fully between capabilities and technologies. Our recommendation is to allow all suggestions from the participants as long as they can be explained and avoid a definition dialogue. The CIO will have plenty of time to translate the outcome into strategic technologies afterward.

1.6 Building the Current-State Strategic Capability or Technology Map — Group Exercise (About 15 Minutes)

- This is the second exercise, and it is preferably done with the whole group.

- The facilitator reminds the group of the result from the first exercise (Slide 31).

- The facilitator walks through some simple guidelines of how to rate capabilities or technologies in the map (Slide 32). See Figure 5 and the accompanying text.

- The facilitator brings up Slide 33 (see Figure 6) and exits display mode to document directly on the projector screen under the directions of the group, following the basics steps below.

- This agenda item uses Slides 31 to 33 in the accompanying deck. Slide 39 (see Figure 7) is an example for the facilitator's benefit.

Figure 5. Quadrants of the Strategic Technology Map and Basic Rating Criteria
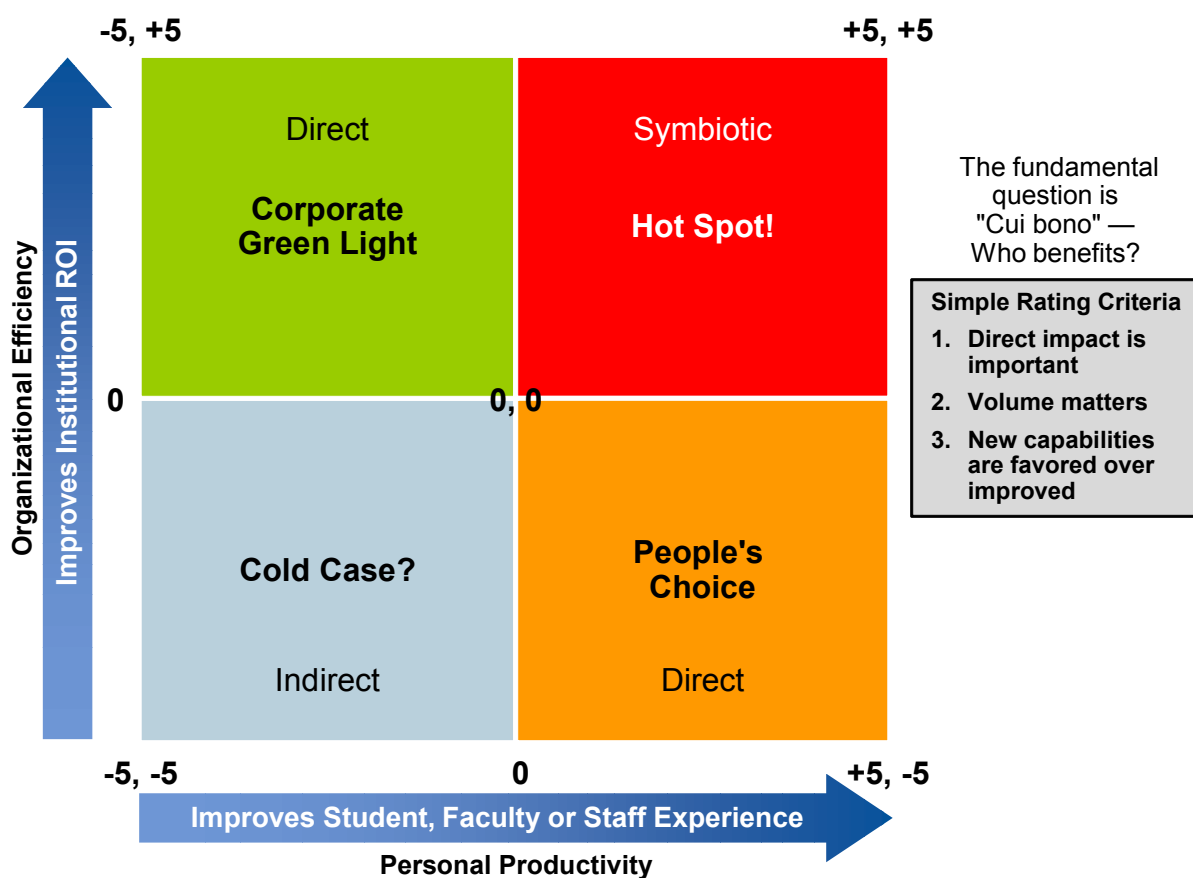
Source: Gartner (April 2014)

We have conducted several workshops on developing Strategic Technology Maps with clients, and we have seen that the context of the institution in general and its leadership in particular have a

large impact on the relative positioning of the technologies on the personal productivity and organizational efficiency axes.

From a practical standpoint for this Toolkit, the only thing needed is to put a "dot" on a map and to rearrange the dots continuously, depending on the relative value of all the dots. Sometimes, it helps envisioning a value between –5 and +5 for personal productivity and organizational efficiency. This places zero in the center of the map between the quadrants. We have used that coordinate system to make the explanation in this *text* simpler. However, in the workshop, the values can be (and preferably will be) omitted as their values are easily exemplified by the positions of the dots on the screen. When assigning the values, remember that the Strategic Technology Map is a structured qualitative tool and not a quantitative tool. The axes of this Strategic Technology Map are given two definitions:

1. Personal productivity as improving student and employee experience for the x-axis

2. Organizational efficiency as improving institutional ROI for the y-axis

This simplified version of the Strategic Technology Map focuses on the *intuitive* rating of how good a certain capability or technology is for the organization versus for the individual (student, faculty or staff). By having two definitions, we avoid a too narrow interpretation of the evaluation criteria, so this can become a quick collaborative strategic sorting tool.

Despite the intrinsically relative rating of technologies, we provide a few simple guidelines on assigning values to personal productivity (PP) and organizational efficiency (OE). We used the following guidelines to assign values. The coordinates below are based on a generic Everybody's U:

- **Direct impact is important.** If a technological capability empowers people to make decisions that directly impact the ROI of the organization, or if it directly impacts the student, faculty or staff experience, then it usually scores more than zero in the respective category. Examples include ERP (–4 PP, +4 OE) and tablets (+4 PP, –3 OE). If the technology needs another technology or service built on top of it to be of direct value, then it usually scores below zero. A good example of that is service-oriented architecture (SOA; –3.5 PP, –1 OE).

- **Volume matters.** The larger the number of individuals who the technology impacts, the higher its score is. For example, lecture capture technologies (+4 PP, +3.5 OE) score higher than cloud high-performance computing (HPC; +1 PP, –4 OE), because it is likely to impact a larger number of students relative to the researchers using HPC.

- **New technologies are favored over improved technologies.** Technologies that provide a completely new capability are usually strongly favored over technologies that improve only certain aspects of an existing capability. For example, "cloud" office productivity suites (+2 PP, –2 OE) are often far less strategic than adaptive learning (+3.5 PP, +4.5 OE). The reason is that most enterprises already have an adequate office productivity suite, whereas most institutions lack adaptive learning capabilities. Furthermore, the window of true competitive advantage is usually smaller for new technological capabilities.

This exercise can be done as a breakout session, but that adds time. More importantly, in our workshops, we have noticed that groups are seldom energized by spending a lot of time on the current state of technology-related capabilities. In some cases, it can even turn into just

complaining and the usual blame game, if it is not moderated carefully. Therefore, we recommend spending less time on this agenda item and conducting it as a group exercise, using it predominantly to exemplify how the Strategic Technology Map works using familiar institutional examples, such as student administration (SIS), enrollment (CRM), or marketing or branding (Web or social presence):

1. Copy the red dot, including the text "xyz," in the center of the Strategic Capability or Technology Map (see Figure 6). Ask participants what capability or technology they want to rate, and place it according to the will of the group.

Figure 6. The Strategic Capability or Technology Map Template
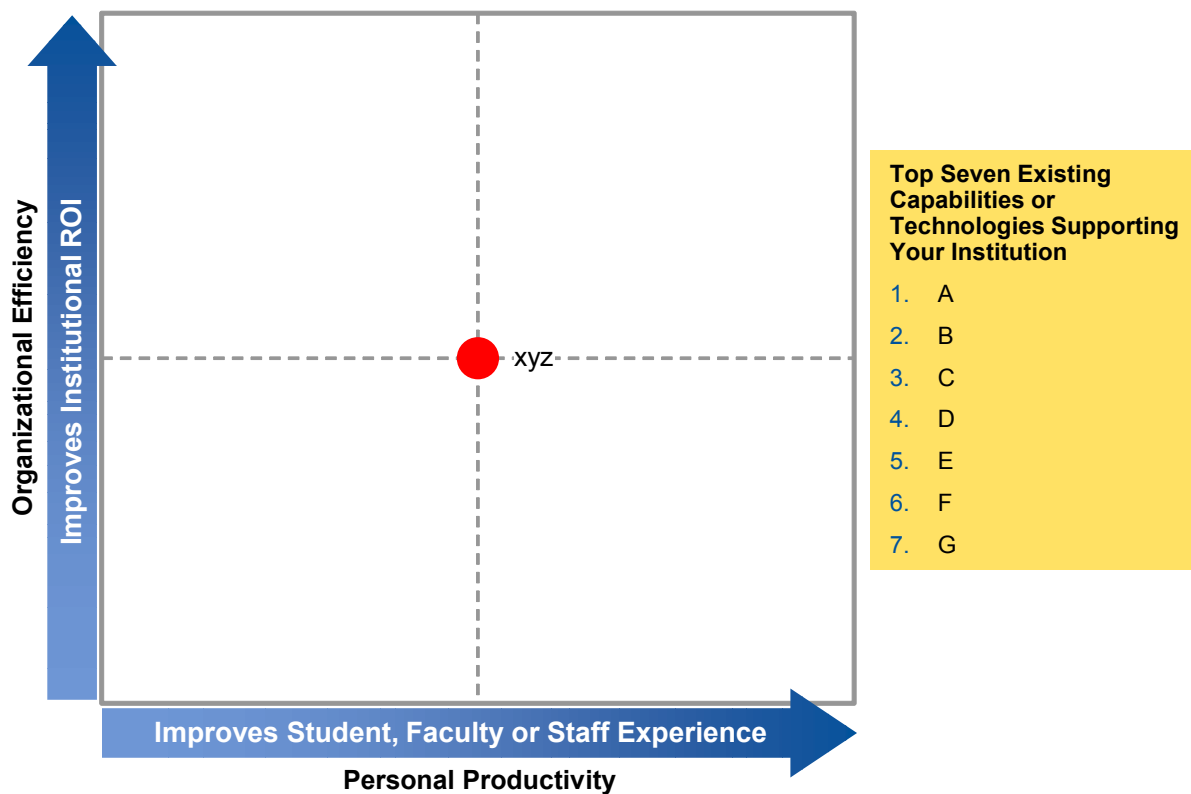
Source: Gartner (April 2014)

2. If there are no suggestions, start with, for example, enrollment if you are focusing on capabilities, and CRM for enrollment if you are focusing on technologies. A good approach is usually to come up with a raw list in the yellow box in the handouts (Points 1 to 7) and then plot them.

3. Do about five to seven dots until the group feels comfortable with the rating. Again, it is important to emphasize that this is a structured qualitative tool and that you want the participants' "gut-feel," "top of the head" answers. At this stage, the group should reasonably

reach agreement about the top three capabilities or technologies, or at least understand that different stakeholders have different priorities.

Figure 7 is one quite typical example of what the exercise can result in.

Figure 7. The Strategic Capability or Technology Map Template: An Example Outcome From a Workshop
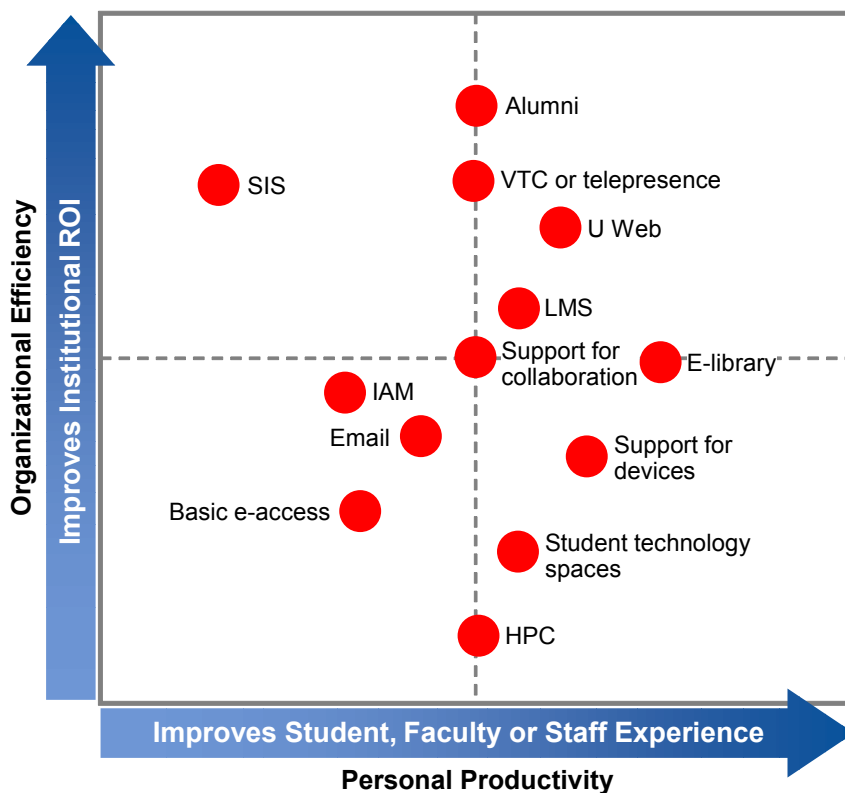
HPC = high-performance computing; IAM = identity and access management; LMS = learning management system; U Web = extranet; VTC = video teleconferencing

Source: Gartner (April 2014)

In this case, the group was a well-composed IT strategy committee representing many key stakeholders in the university. This group quickly identified 11 strategic "technologies" (such as HPC and LMS) and two technology-related capabilities (support for collaboration tools, and support for devices). In this case, the group noted that SIS is strategic, but perceived it as a cumbersome tool for administrators and offering little personal productivity value for students and faculty. A focus on fundraising made the alumni management capabilities stand out.

This university had campuses abroad, which is why a singular technology such as VTC or telepresence was rated very high. Overall, it was interesting to note how the researchers especially emphasized that email and basic e-access (for example, Internet and storage) had to be strategic. They agreed that it was not a competitive advantage, but the downside of any disruptions was perceived so great that it had to be a part of the Strategic Technology Map, although placed in the

"enabling" quadrant. The relative placement of LMS and HPC demonstrate that the group agreed that "volume matters" for the strategic priorities of the CIO. In this case, it is interesting that the technically savvy group also included dots for support for collaboration and support for devices to denote them as strategic capabilities.

Outcome

The outcome of this exercise is to help the CIO document what capabilities or technologies are perceived as being strategic and needing attention. Again, there is room for expectation setting around each dot. However, because of the time constraints of this workshop, that is best left to a separate session in which this STM has been socialized with more stakeholders (including IT) to collect more input.

1.7 Future-State Strategic Capability or Technology Map — Breakout Exercise (About 30 Minutes)

- This is the third exercise and the most important one, and it is ideally done with at least three breakout groups of about five members. It is best to have a separate breakout room for each group. The groups are preferably prepared beforehand.

- Before the groups go to their rooms, the facilitator brings up Slide 34 and instructs the groups to identify the five to seven most needed capabilities or technologies. A good approach is usually to come up with a raw list in the yellow box in the handouts (Points 1 to 7) and then plot them. A group scribe and presenter should be appointed. The facilitator then tours the groups to help with any questions.

This agenda item uses only Slide 34 (see Figure 8).

Figure 8. The Strategic Capability or Technology Map Template

Top Seven Needed Capabilities or Technologies to Enable Your Future Institution

1. A
2. B
3. C
4. D
5. E
6. F
7. G
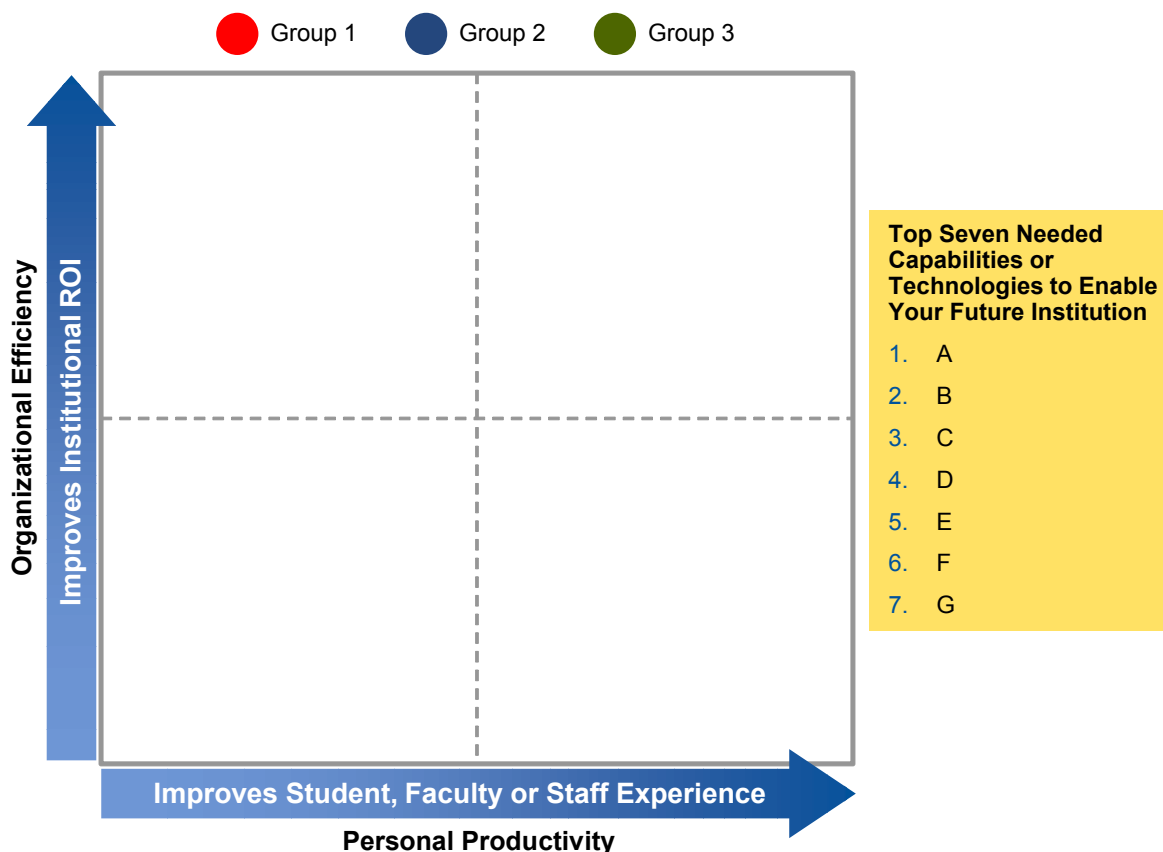
Source: Gartner (April 2014)

1.8 Future-State Strategic Capability or Technology Map — Bringing It Together (About 20 Minutes)

- This agenda item uses Slide 34 in the accompanying deck. Slides 40 and 41 (Figures 9 and 10) are examples for the facilitator's benefit.

- The facilitator brings the groups back in to the main room.

- The facilitator brings up Slide 34 (see Figure 8) and exits display mode to document directly on the projector screen under the directions of each group scribe or presenter following the basic steps below.

- Copy the red dot, including the text "Group 1," at the top of the Strategic Capability or Technology Map. Ask Group 1's scribe or presenter to walk through its dots, including a quick description of why the group chose that capability or technology and why the group placed it were it did.

- Repeat the process for each group, using a different-colored dot for each group.

- Highlight differences in opinions between groups, and discuss the reasons why.

■ Try to identify and agree on the top one to three priorities.

Figure 9 is a recent example with two groups of what the exercise can result in.

Figure 9. The Strategic Capability or Technology Map Template: An Example Outcome From a Workshop
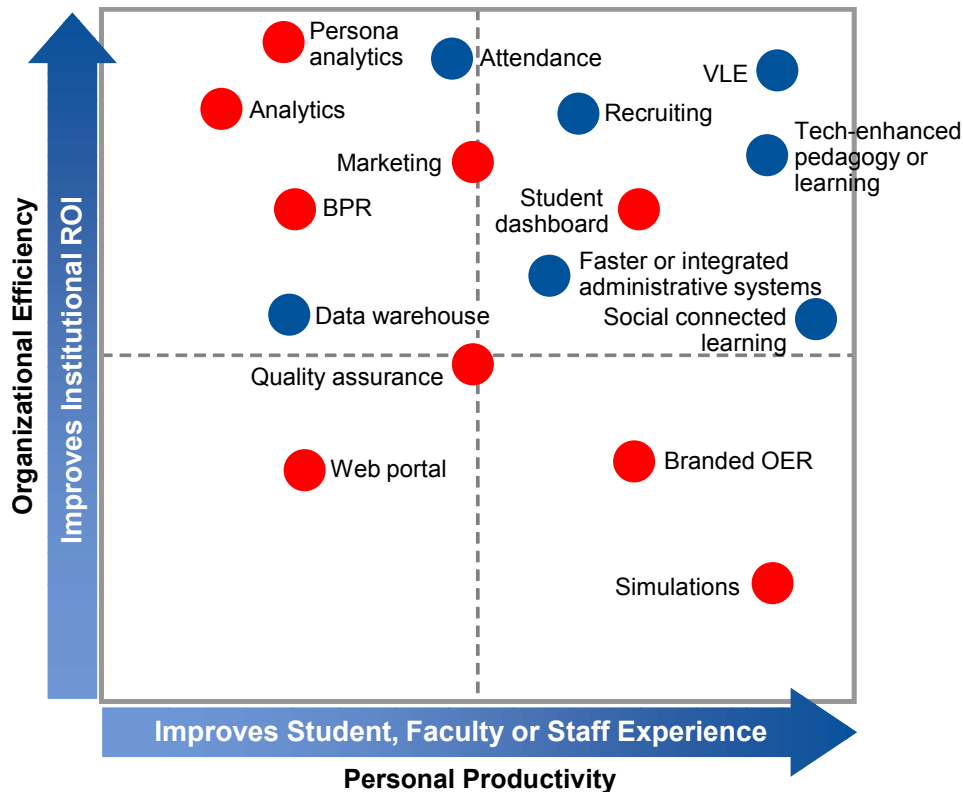
BPR = business process re-engineering; OER = open educational resources; VLE = virtual learning environment

Source: Gartner (April 2014)

In this case, an extended president's cabinet formed the two groups. They identified 16 strategic technology-related capabilities that they thought IT (the CIO) should support. In this case, there were relatively few overlaps between the two groups (red and blue), which is quite unusual. Only analytics and data warehouse, as well as BPR and faster or integrated administrative systems, were related. Student-focused capabilities stood out with VLE, tech-enhanced pedagogy or learning, and recruiting at the top in the Hot Spot! quadrant. A specific pain point and capability, attendance, also got a high rating in the Corporate Green Light quadrant, which shows perceived high value and also points to a concrete service that the CIO can help provide. Several dots indicate that a joint responsibility is needed, such as BPR and quality assurance.

Outcome

Figure 10 is the follow-up future-state STM of the current-state STM example shown in Figure 7.

Figure 10. The Strategic Capability or Technology Map Template: An Example Outcome From a Workshop

BI = business intelligence; UCC = unified communications and collaboration

Source: Gartner (April 2014)

This group (the IT strategy committee) showed considerable maturity in developing the future-state STM (in fairness, this workshop was conducted over half a day, including lunch). A clear strategic priority was to improve the SIS to better support the student experience, moving SIS from the Corporate Green Light quadrant in Figure 7 to the Hot Spot! quadrant in Figure 10 (effectively creating a from-to visual gap analysis between the two STMs). The somewhat unusual, but

effective, approach that this group showed was to realize that a combination of one or more technology-related capabilities can provide a better strategy than singular capabilities. The group was looking for "1 + 1 = 3" situations. In this case, the group realized that SIS and e-portfolio represented what it wanted to achieve for the institution.

A similar approach to the need to improve alumni relations brought together CRM and alumni, and so on. In addition, this group added governance and user training as key strategic capabilities to highlight that, to make the most of IT resources, more is needed than technology itself. It is worth noting that key infrastructure capabilities also made it into the future-state STM (ensured bandwidth, infrastructure and IAM), sending a clear message to the CIO about the need to maintain high-quality baseline services.

Outcome

In this case, there was a clear consensus that a project to acquire a new SIS was needed. As a first step, the CIO was asked to produce an STM for the future SIS visualizing the needed capabilities in terms of what improves institutional ROI or organizational efficiency, as well as what improves student, faculty or staff personal productivity.

1.9 Wrap-Up or Next Steps (10 Minutes)

The facilitator wraps up and outlines the next steps (see below for examples):

- The CIO sends out the resulting slides to provide a common memory for the group.

- The CIO takes the immediate team under the CIO and produces a more detailed Strategic Technology Map, based on the outcomes of the workshop, possibly using the "connect the dots" Toolkit (see "Connecting the Dots to Gain Competitive Advantage: Articulating a Technology Ecosystem Advantage to Your Board" and "Toolkit: Speed Up Innovation by Identifying Capability Ecosystems, and Gauge Tipping Points With a Hype Cycle/Strategic Technology Map Mashup"). As a part of this, the CIO may propose additional technology-related capabilities (especially in the enabling Cold Case? quadrant) to improve the balance.

- The CIO can then propose a session (typically just one hour) with the stakeholder group to present, refine and update the Strategic Capability Map (and perhaps the corresponding Strategic Technology Map). This is then repeated as often as needed (at least once per semester and often twice per semester). Sometimes, this is just to confirm the strategic direction and, sometimes, to make adjustments due to changes in institutional strategy or, more likely, changes in the technology landscape that impact the institution's capabilities.

- Note: The HEBMS plot, as well as the SCMs and STMs, are only components of the wider strategic planning process. We recommend that you reach out to your Gartner client partner or executive partner for further support.

An optional step is to use Slide 35 as a final word for the workshop session:

- The quote from the philosopher Arthur Schopenhauer: "Thus, the task is not so much to see what no one yet has seen, but to think what nobody yet has thought about that which

everybody sees." This is meant to say that this methodology encourages innovation by seeing the big picture (as a group) and enable thinking that was not possible when each had his or her own siloed view.

- The quote from U.S. President and General Dwight D. Eisenhower: "Leadership is the art of getting someone else to do something you want done because he wants to do it." This is meant to emphasize that executing a strategy is not about what is in somebody's head, but is about enabling the collective to see the goal and to want to achieve it.

This workshop is designed to achieve both of these goals in a format that allows the speed to handle a lot of complexity and more-frequent updates and checks than traditional document-based strategic planning allows.

Table 1. Compact Run Sheet Intended for the Facilitator of the Workshop

Approx. Time	Agenda Item	Comment	Slides in Attached Deck
00:00 (30 minutes)	Introduction and purpose of the meeting	▪ Each person introduces himself or herself (if needed) and says a sentence or two about his or her expectations. ▪ The facilitator (preferably someone neutral to both sides and trained as a facilitator) presents the purpose of the meeting. It is about "helping them help the CIO help them" in the context of the needs of the whole institution — people, process and technology.	1-4
00:30 (15 minutes)	Current institutional and IT strategic objectives	▪ The workshop sponsor walks through the current institutional and IT strategic objectives to emphasize that this workshop builds on existing strategic planning efforts — it is not a sign of starting over.	5
00:45 (30 minutes)	Introducing the higher education business model scenario framework	▪ The facilitator introduces the HEBMS framework and walks through the four scenarios and their extreme characteristics.	6-15
01:15 (30 minutes)	Where is the institution in the HEBMS — now and in the future? And who are our competitors? (group exercise)	▪ This level-setting exercise is to see how much focus or diversity the institution has and to identify its competitors and challengers. This aims to set expectations at the right level for the CIO — that is, the more focused the institution is, the more IT can help. The facilitator documents this directly on the projector screen.	16
01:45 (30 minutes)	Introducing the Strategic Technology Map and its relation to the HEBMS	▪ The facilitator introduces the Strategic Technology Map framework, which illustrates the diversity of capabilities needed to support the different HEBM scenarios.	17-30
02:15 (15 minutes)	Building the current-state Strategic Capability or Technology Map (group exercise)	▪ The facilitator walks through institutional examples of how the SCM and STM work and how dots are rated. The facilitator documents this directly on the screen.	31-33
02:30	Building the future-state Strategic	▪ Three to five groups, each with about five members, break out and discuss what	34

Approx. Time	Agenda Item	Comment	Slides in Attached Deck
(30 minutes)	Capability or Technology Map (breakout — including refreshments)	capabilities are needed to support the institution in 20xx. If they can identify how capabilities relate to technologies, that is a bonus (but is not necessary).	
03:00 (20 minutes)	Building the future-state Strategic Capability or Technology Map — bringing it together (group exercise)	▪ All groups gather together to combine the results of the breakout session and discuss the placement and relative ranking of dots. The facilitator documents this directly on the screen.	34
03:20 (10 minutes)	Wrap-up or next steps	▪ The facilitator wraps up and goes through the next steps.	35
03:30	The end		

Source: Gartner (April 2014)

Downloadable Attachments

🗔 .PPTX **262152_hebms_stm_wksp.pptx**

This presentation template is intended to be modified, according to the instructions above.

🗔 .PPTX **262152_wksp_handouts.pptx**

This should be printed out and handed to all workshop participants for use during the exercises.

Gartner Recommended Reading

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

"Introducing Visual Strategic Planning Using Four Higher Education 'Business Model' Scenarios and Strategic Technology Maps"

"Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — Only Us U Focuses on Brilliance for the Market"

"Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — Me, Not U Looks to Edge in the Market"

"Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — Everybody's U Leverages Scale of the Market"

"Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Map — All About U Seeks Speed to Market"

"Predictions for the Higher Education 'Business Model' Landscape in 2025 and Beyond Will Help CIOs Plan Now"

More on This Topic

This is part of an in-depth collection of research. See the collection:

- Visual Strategic Planning Using the Gartner Higher Education 'Business Model' Scenarios and Corresponding Strategic Technology Maps

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