



Adventures in Program Management

A Best Practice View of Program Management

Program Management in the ITAM world, as well as in all business environments, is all-encompassing of so many physical aspects; the bits and pieces, all needing to be aligned as part of the focused approach to attaining the overall goals of the organization. As a simplification in my own mind, I view a program as a whole pie, with the wedges of that pie representing the projects needed to make the program complete. Obviously, there are many pieces to the program pie; some larger than others, but all having importance in the continuity of the program as a whole. Drill down even further to find the ingredients; the personnel, the funding, the schedules, the achievements and the pitfalls. Generically speaking, when all ingredients are combined, (properly managed) you end up with a fully functional program.

Ah, if only life was as simplistic as a generalized analogy. That's just not the way it is. There are many management factors to deal with on a daily basis. Some are calculated and some are not. Was the Program Manager able to foresee and pre-adjust the schedule to include a Project Manager leaving the organization mid-stream during a project? Additionally, skyrocketing fuel prices have incurred an 18% increase in project costs with no additional funding, not to mention that two key project personnel are absent from the job; one due to an extended sickness and the other due to a severe skiing accident. Shall I continue? The fact remains that the Program Manager is the overseer of any number of concurrently run projects, each with unique adversities. The daily variables, the scope creep and the most unbelievably freakish occurrences that can and do happen without notice must be understood, accepted and somehow accommodated to achieve the completion of the entire program. The stakeholders, senior executives and funding entities are an unforgiving bunch. They do not care! They pay you, the Project Manager, to make everything right, regardless.

Now, multiply all of this times the number of projects that constitute the whole program. It's a wonder that anyone would elect to take on such ulcer inducing responsibilities. Luckily, there are such people; they are the Program Managers who seem to thrive on such adversity. These special individuals have a natural gift of being able to orchestrate; to plan around and through the adversity that they consider to be a normal work day.

Beyond possessing a natural aptitude for this depth of planning, experience and specialized training are necessary for any individual to succeed in this lofty endeavor. As an answer to the need of specialized training, IAITAM has created the Certified Information Technology Asset Management (CITAM) course of instruction and certification program (based on the IAITAM Best Practice Library "Program Management" volumes 2 and 2-2) which was designed to impart knowledge, advice and Best Practice Methods to ITAM personnel world-wide. Of course, not all great Program Managers have CITAM certification; those who don't just had to work harder for their Program Management solutions.

Beyond the generalities of Project Management and the problems that can occur, I would like to steer this article towards, and narrow the focus to the overall management of an ITAM Program. That being said, I must also bring to your attention that whenever possible, I somehow always mention the fact that you must have a plan to succeed, and the plan here is to cover numerous aspects of Program Management including goal-setting and how all of this relates directly to IT Asset Management.

Lifecycle From Cradle to Grave

All programs induce change into the IT infrastructure such as new assets, redeployment of assets, upgrades and modifications to existing assets and the destruction and disposal of assets. The program invokes the other processes defined in the best practices, which must include complete Lifecycle Management. This process area entails the management of technology from cradle to grave. A simple yet parallel example is the automobile, which has its own lifecycle from the time it rolls off the assembly line until the time it is delivered to the junk yard where its components may be disassembled and sold off separately or destroyed in its entirety. During the life of this vehicle, its usability changes and maintenance requirements evolve as the vehicle ages. Very much the same concept applies to IT assets, with the exception of different governmental rules, regulations, restrictions and organizational guidelines.

Like any other technology, an IT asset has a life where its

value to the organization changes over time and the costs to maintain the asset change as well. Sooner or later the asset will be redeployed, refurbished or replaced and these actions are all driven by the lifecycle of the asset. Replacing, refurbishing or redeploying an asset affects several process areas as defined in ITAM Best Practices, requiring updates to the asset's status tracked by the ITAM team.

Program Management provides a high-level view of all IT projects mapped to the business objectives that the projects are meant to fulfill. The collection of key process areas provides a window into the costs and resources required to meet the objectives. Program Management provides a method for managing large and numerous projects for the purpose of communicating status and monitoring the health of all projects, as well as maximizing the use of assets by utilizing the assets to their fullest and upgrading the asset, when possible, to capitalize on the initial investment.

Program Manager Position and Responsibilities

An IT Asset Manager is the business professional that is tasked with ensuring that the overall IT Asset Management Program is producing maximum value for the organization. The IT Asset Manager plays a pivotal role within the IT Asset Management Program, and in many organizations, the IT Asset Manager and the Program Manager are interchangeable titles dependent upon the specific job description and functional role within the respective organization. Most of this decision is based on an organization's size and IT department maturity.

The responsibilities of the Program Manager are varied and many, which include but certainly are not limited to:

- Normally reports directly to a "C" level executive
- Maintains the budget for all IT Assets within the organization
- Establishes guidelines and standards for the IT Assets within the organization
- Identifies and mitigates legal risk associated with IT Assets within the organization
- Maximizes the value of the IT Assets within the organization
- Establishes policies related to IT Assets within the organization
- Coordinates other departments as they interact with the IT Assets within the organization
- Coordinates acquisitions of

IT Assets within the organization

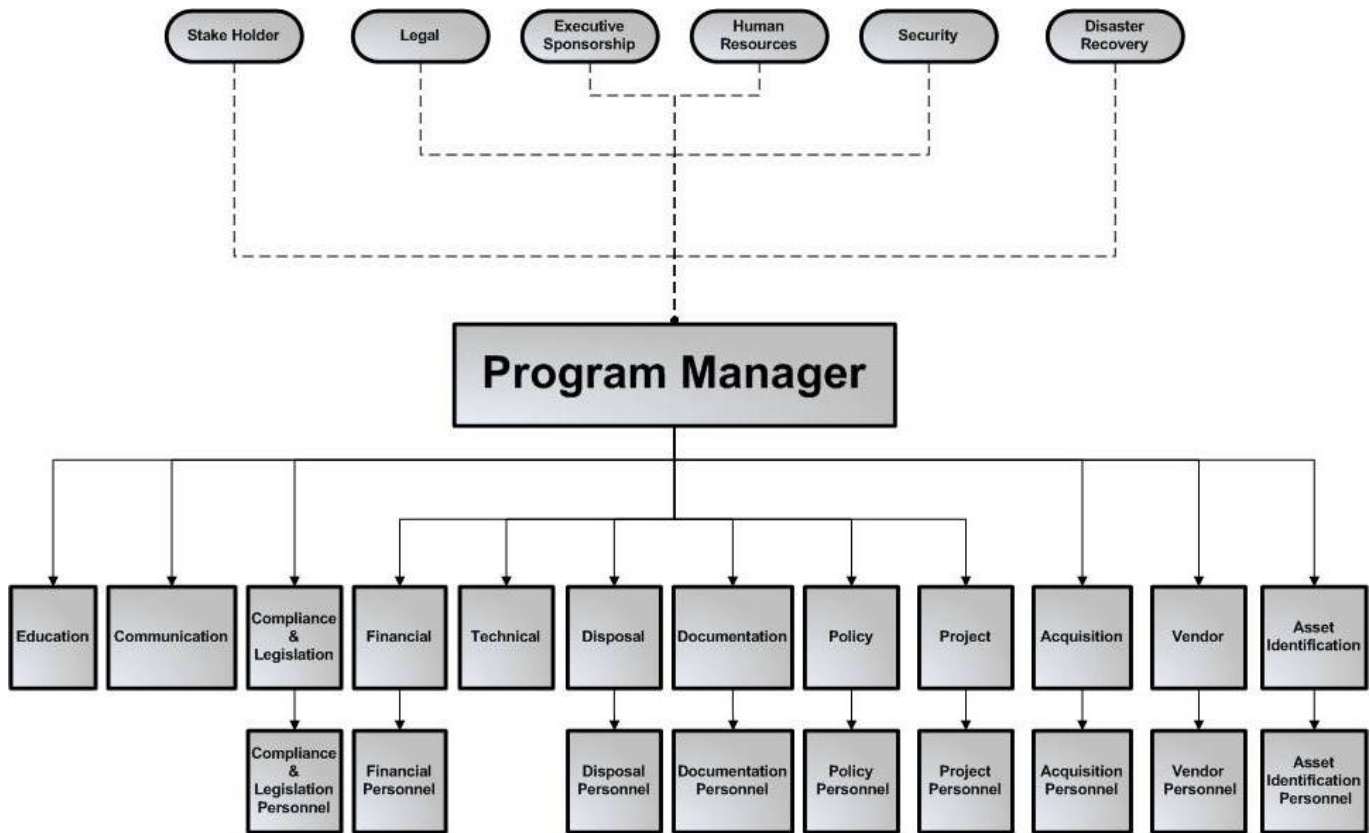
- Establishes communication and educational paths throughout the organization as related to IT Assets
- Coordinates projects as related to IT Assets within the organization
- Researches, comprehends, and communicates regulatory and legislative issues as related to IT Assets within the organization
- Establishes guidelines and maintains all documentation as related to IT Assets within the organization
- Identifies, coordinates, and maximizes the value of vendor relationships as related to IT Assets within the organization
- Responsible for all tracked IT Assets within the organization ensuring that each are properly identified, locatable, and accounted for at all times
- Establishes repeatable processes within each of the key process areas of the program to ensure success and to maximize value for the organization

The ITAM Program

The purpose of defining an ITAM Program is to encapsulate and define the mission, overall strategy, objectives, measurements and prioritization of IT Asset Management efforts within an organization.

The ITAM program is also the centralized process by which all activities are defined, implemented, controlled and monitored. A mission statement during implementation is very important to the program to communicate exactly what the program does, the importance of the ITAM team, and what value will be gained by the organization. It is absolutely





critical that the mission statement accurately conveys the program’s purpose to the executive team to gain their confidence and buy-in. Without proper backing and support, there can be no effective program.

When accepted and fully supported, the derived strategies and objectives define the roadmap which supports the mission of the ITAM Program and should clearly state the path to a successful program mission based on the needs of the organization.

The measurements gained throughout the process will provide the necessary feedback to determine the effectiveness of the ITAM Program. This feedback will assist the Program Manager in determining the strengths and weaknesses of the ITAM Program enabling them to incorporate any required adjustments specific to the needs of the organization.

Value, continuity, achievement and recognition are the desired end results when an ITAM program is effectively run; all of which are a strong driving force behind Program Management.

The diagram shown below graphically represents the inter-connecting relationships between all involved organizational entities and processes including communication and education. Notice that the Program Manager is set directly in the middle of everything. This representation, though quite complete and showing effective lines of communication, is shown in a static state with the arrows pointing in one direction. The reality is that an effective program is quite dynamic with cross communication to and from the Program

Manager happening on a continuous basis.

Now that we have seen a “snapshot” of a textbook overview of an ITAM Project Manager, Project Management, duties, responsibilities, relationships, etc; my guess is that you are probably astounded by the striking similarities to your organization’s ITAM Program and its well defined hierarchy...or maybe not. There is always a possibility that your organization, just like so many others, might not have a fully staffed or completely matured Program in place. Point no fingers and cast no blame; this is the point of realization that will entice you and others within your environment to take a closer look at standing policies and procedures, staffing and the finite details of where your program is at this point in time, and why.

Eye opening realizations such as these will of course invoke very poignant questions such as:

- What is the current state of your ITAM Program
- Is there a proper personnel structure in place
- Does your organization support current and/or proposed ITAM goals
- What are the specific goals of your ITAM Program
- Is your organization strong enough to provide the support and backing necessary for a fully structured ITAM Program
- Are sufficient resources available for the ITAM Program to succeed

Clearly, to create an implementation plan, there is a need

for a systematic plan of action. Baseline assessments are necessary to find the specifics of your existing infrastructure as compared to the goals of what needs to be accomplished.

After assessing the current state of your ITAM program, (there are many ways to accomplish this. You and your team will be the best judge on what methods to use) decide what your implementation goals will be.

Program Management Implementation Goals

Through diligent research and asset management experience, IAITAM has defined six core goals as part of the best practice for Program Management. You may find these goals to be quite beneficial as a guideline for your ITAM program goal setting endeavor.

1. IT Asset Management activities are identified planned and executed as a program consisting of prioritized and managed initiatives

Like a well oiled machine, a well planned program runs smoothly because of the time and consideration devoted to it. The program structure is aligned with and supports the overall business objectives of the organization to ensure that initiatives are organized, coordinated and prioritized thereby reducing the risk of project failure.

2. Business cases are developed as part of the IT Asset Management decision making and prioritization process

A business case identifies specific goals and measures as well as documenting expected costs, benefits and risks. With this information available, IT Asset Management decision makers will be able to better support the program processes, identify the key value components that impact return on investment, better address all organizational benefits and costs, make investment decisions on an objective and informed basis and will be able to better prioritize organizational efforts focused on achieving the most significant values. Additionally, the organization will be able to better track investments as a part of the program follow-through to ensure each initiative delivers the value that was projected.

3. Standards for hardware and software are defined and maintained

ITAM Program Management maintains balance between program goals and the overall business needs. Some of those needs are answered by maintaining the lifecycle of assets in all respects. From approval to acceptance, throughout the normal Installs, Moves, Adds, Changes (IMAC) process and into the redeployment or destruction phase, the IT Asset Manager must ensure that standards for hardware and software are defined and

Where do your IT assets go when you dispose of them?

- Landfills in third world nations
- Evidence rooms awaiting litigation
- The grateful hands of identity thieves
- The water supply you drink from



Where should they go?

Intechra is the world leader in IT asset disposition. We focus exclusively on eliminating the risks surrounding data security, compliance, and environmental impact, while maximizing value recovery on IT asset investment for businesses around the world. Visit us at www.intechra.com/itak for more information or to schedule a meeting.

maintained in a way that incorporates the current needs of the organization, reflects the IT strategic plan, reflects industry and technical recommendations and meets the needs of end users.

4. IT assets are received, installed and maintained

In a small environment, the receipt and installation of an asset is a relatively easy and straight-forward process with few people involved. This is not the case for Program Managers in larger organizations where there are countless variables involved which include more policies, regulations and many personnel involved in the process of receiving, identifying, tagging and installing assets. Some best practice processes for asset receipt and installation would include interfacing with help desk systems to initiate, record, close and measure the service initiative, ensuring that proper tagging procedures are in place and practiced, ensuring that an RMA process is in force and that all asset processes are handled in the same systematic manner and inputting the data into a centralized system to ensure repetitive continuity with ease of access.

5. Transitions during use (the MAC processes of IMAC) are conducted

Moves, Adds and Changes are the transition of an asset from its current location to another, or changes in hardware and/or software, or all of the above. Most times when movement of an asset is necessary, software and possibly hardware changes are incurred to facilitate an effective move of the asset, and all moves must include the changes necessary to facilitate the new work station. A properly managed move will ensure that IMAC service levels are defined and managed with minimal impact to the business, software removal is performed in a clean manner, leaving no codes behind, and IMAC activities are coordinated with request management, release management and change management activities. Positive outcomes of an effective MAC process will be seen in lesser work disruption, planned moves can be easily separately from unauthorized moves or missing assets and standardization is more easily preserved to build pools for redeployment and ease in lease returns.

6. Mass change/refresh events are coordinated

An important part of asset management is to be prepared for mass change events and refresh cycles. Knowing the asset life expectancy is a very good start in the planning phase. When that knowledge is paired with set standards, policies and procedures, it helps in preparing the cycle execution in ways that include planning for technical, licensing, delivery, storage and distribution issues, builds and maintains individual asset record updates the same as any other MAC, works with the IT strategic direction and provides feedback on

technical and logistic implications and documentation that is necessary to prove ownership and all are controlled and properly stored according to documentation management processes. Additionally, licensing compliance is maintained through only applying licenses appropriately or harvesting licenses for redistribution.

Directed Planning, not Rocket Science

Six basic goals, that when written and understood, just seems to make logical common sense. I have heard it said time and time again that IT asset management is not rocket science. That is a true statement. Quantum physics have no place in the proper direction, planning and execution of an effective ITAM program. An understanding of what is needed with a directed focus on how to best fill those needs and strong organizational support are the foundation of solid Program Management.

There are indeed so many more processes and sub-processes that we can not even begin to effectively cover in the breadth of this article. Important aspects of Program Management that must be understood and considered include process and portfolio management, change management, managing strategic needs, reporting procedures, Key Process Area (KPA) relationships and dependencies and how they interrelate in all aspects of IT asset management, the importance of communication and education in the ITAM environment, etc. The list is long, yet as stated before, the answers to the daily function of Project Management are not found on a slide rule; those answers are derived through the zeal of an ambitious ITAM team directed by a knowledgeable Project Manager who is driven to achieve success for the organization.

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Excerpts of this article were taken from the IAITAM Best Practice Library (IBPL) Volumes 2 and 2-2, Project Management and the IAITAM Best Practice Blueprint (BP²)