INTRODUCTION

INFORMATION TECHNOLOGY (IT) BUSINESS EXECUTIVES are experiencing increasing professional pressures as their organizations strive to become truly global. In an effort to leverage their resources around the world and serve global customers, companies are turning to information technology as a means of achieving these objectives. IT capabilities have evolved to the point where some would argue that IT can, for the first time, be a strategic enabler in helping a company become truly global. In order for IT to be a strategic enabler for a company on a global basis, all major IT investments must be aligned with the business goals and strategies of the organization. One step toward aligning IT investments with business objectives and strategies is to bring key business and IT leaders to a common understanding or vision of how information will enable the company's strategy and future competitive position in the marketplace.

What Does It Mean To Be “Global”?

In the age of economic globalization, it is not uncommon for companies to expand beyond domestic boundaries into foreign markets in search of new growth opportunities. If a company has operations around the world, does this make the company a “global business”? In short, the answer to this question is no. Being truly global involves mobilizing company resources around the world and presenting a common face for the company’s key stakeholders — customers, suppliers, shareholders, and employees.

What Is a Global Information Vision?

Let’s start with what an information vision is not. It is not a statement conceived in the office of the CIO and posted above the door in the IT department. It is not about having the IT function achieve functional excellency through the use of leading edge technologies.
An information vision is a clear statement of how an enhanced information base will help the business achieve its strategic objectives. It is stated in business terms and contains a clear link to the competitive positioning of the business. A vision also indicates business outcomes that are recognizable by business and IT leaders alike.

As shown in Exhibit 1, within the IT decision-making hierarchy, the Information Vision provides a link between the business strategy and objectives and the IT strategy. Bringing the key business stakeholders to agreement on the Information Vision provides direction throughout the company on where IT investments should be focused to bring the most value to the company.

OBJECTIVES — “PAY-OFF IDEA”

Why Do You Need an Information Vision in Your Company?
There are a number of objectives that you should achieve as you facilitate the development of your company’s information vision:

1. Raise the understanding at all levels in the company of how information and information technology can and will add value for the company.
   – Often executives see the enormous operational and capital expenditures for IT and wonder what value they are getting for their mon-
ey. They fear that deployment of technology solutions may be based on an underlying desire to have the latest technological innovation rather than the pure business value of the investment. Demonstrating the value of IT investments does not stop once an information vision has been established. However, developing an information vision does put into clear business terms how information does and will add value to the business.

- Do your business decision-makers think about information or IT when they are devising their business strategies? Business decision-makers often do not fully understand the capabilities of IT or do not think about how an enhanced information base can enable their business strategies. Engaging key business leaders in the exercise of developing a vision for information in the company will raise their level of awareness.

2. Promote better alignment of IT projects and the business objectives.
- How often do you hear about companies that have sizeable investments in state-of-the-art systems to improve an area or function that is not core to the business? Afterwards they often question how such an enormous investment of capital and human resources has actually changed the company’s competitive position? By engaging key business and IT leaders in developing an information vision linked to clear business outcomes, a common understanding is reached with respect to where the value-adding opportunities exist for IT projects. Any project or opportunity not in line with the vision comes immediately under question.

3. Keep IT personnel focused on achieving an enhanced information base for the company rather than implementing new technologies for technology-sake.
- The visioning exercise creates a better focus on the “I” rather than the “T” in Information Technology. By focusing on information, it forces people to question technology investments that do not result in a sufficient improvement to the base of information that will enhance the company’s competitive position.

4. Develop an understanding of how a common information vision can benefit the global units and the company as a whole — not just another head-office exercise.
- Often the words of a vision or mission mean little to those not directly involved in composing the statements. Especially if your company operates businesses around the world that have a certain amount of local autonomy, these units may offer some resistance if their interests have not been properly represented in developing the vision or they fail to realize how the vision improves the position of their business. For this reason, it can be beneficial to indicate how enhanced use of information will benefit the local units as well.
THE PROCESS

To develop an information vision effectively, it is important to understand that perhaps the greatest value is in the process of developing the Vision rather than in the words of the Vision itself. In order to gain the full value of this exercise, the right level of people in the organization, from both the business and IT community, must be involved in developing the Vision. Having the right people involved, especially from the business community, helps to ensure relevant content, organizational buy-in and business ownership. To ensure relevancy and ownership, the vision must be articulated using words that the business community understands, therefore the words themselves must come from key business leaders. Exhibit 2 outlines the process for developing a Global Information Vision. Exhibit 3 provides the Critical Success Factors for making this a reality.

PHASE 1: ASSESSMENT

If you already have a clear understanding of the current situation of information and information technology in the company then this phase can be condensed. However, it is important to note that there are distinct benefits
in conducting a formal assessment to ensure that your understanding is complete.

As part of the assessment, there are three main questions that need to be answered:

1. **What is the Current State of the IT?**

   The assessment phase provides an opportunity to gain a clear understanding of the current situation and bring to the surface any issues or concerns about the current state of information or information technology in the company. These issues or concerns represent not only areas of improvement, they may also represent significant barriers to changing the way peo-
ple think about the ability of the information and information technology to add value to the business. The business community needs to know that their concerns are being heard. Soliciting input from key business leaders also provides a prime opportunity to begin developing buy-in and ownership for the Vision itself. It is also important to acknowledge past successes or progress that the company has made in IT projects. These successes are often not well known throughout the company and serve to boost the company’s collective confidence in its ability to deliver business value through IT.

2. What are the Major External Forces or Pressures Facing IT?

If possible it is beneficial to understand how competitors in the same industry or companies with similar operations are using IT. Presenting this information may serve two purposes. First, if it is determined that competitors are further advanced in the way they are employing IT, it may serve as a strong imperative for change. Exploring how similar companies use IT to gain competitive advantage can also raise the level of education within the company, heightening awareness of what is possible.

In addition, it may be beneficial to articulate what the current possibilities are in IT today. People may ask, ‘why does the company need a global vision about information?’ It is important for people to understand that for the first time, global communications and real-time information sharing are possible and can deliver significant business value.

3. What are the Business Vision, Objectives, and Strategy?

This third question is perhaps the most important for a number of reasons. First of all, the information vision must be aligned with the vision of the company as a whole. Often the company vision is not explicitly stated or well understood. Therefore, it is important to conduct interviews with key business leaders to gain a clear understanding of where the business leadership intends to take the company in the future and what the critical success factors are for the company as a whole and its core business areas. Secondly, conducting interviews with key business leaders helps build ownership for the vision within the business community. People are more likely to champion the vision when they are part of its development. Finally, it is critical for the vision itself be be stated in business terms. Exhibit 4 provides an example of typical findings that may result from the Assessment Phase.

The Change Imperative

One of the most important outcomes of the Assessment phase is to build a clear understanding of the need for the company to change. The change imperative must be clearly articulated in terms of issues and challenges fac-
ing IT, changing business objectives and strategies, and the new IT capabilities that are available. It is important that the executive group understands the outcomes of the Assessment phase and to agree on the need for change.

**PHASE 2: DEVELOPMENT**

Different approaches may be used to develop the vision. Perhaps the most effective approach is to facilitate a group of key business leaders, including senior executives and key management personnel through each of the following steps. Although effective, this approach is often very difficult to execute especially if the key business leaders are situated around the world. It important to keep in mind that having active involvement from as many key business leaders as possible is critical to the success of the initiative. Therefore, if it is not possible to conduct steps 1 through 4 as one group, it may be necessary to break the group of targeted participants into smaller focus groups.

**Step 1: Develop Vision Framework**

Establishing a framework may not be essential but can be beneficial both in developing the vision and communicating it. A framework can provide an effective structure in which to organize ideas regarding how an enhanced information base can enable the business to achieve its business objec-
tives. The framework can also prove very useful in communicating how the vision can be linked to specific business outcomes. Exhibit 5 provides an example of a framework that could be used for a global company that is looking for ways to articulate how a common vision for an enhanced information base will not only improve the performance of the company as a whole, but also to improve the performance of the individual business units around the world.

**Step 2: Gain Input from Key Stakeholders**

Depending on the audience, different techniques can be used to gain input from key stakeholders. Often it is difficult to obtain extensive time with top executives. Therefore it may beneficial to include specific questions during the executive interviews in the Assessment phase that will provide insight into how enhanced information may better enable the business to achieve its objectives.

The following are examples of specific questions that could be used to facilitate input from the key business leaders:

- How can information help the company attain its vision?
- What information would make a difference in the various business units? For customers? For managers?
- What impediments exist today to using information to add value to the organization and to make a difference to the bottom line?
Using the sample framework presented in Step 1, Exhibit 6 provides some examples of possible ways to add value or enable business strategies. These examples, when linked to the vision, provide clear business outcomes that may result from developing an enhanced information base.

**Step 3: Develop Draft Information Vision**

This step involves developing a simple statement that combines the strategic objectives and critical success factors of the business with the feedback that has been given regarding how the business could change as a result of having an enhanced information base. An example of this is shown in Exhibit 7.

How the draft Information Vision itself is assembled depends largely on the development approach that has been chosen. If all key business leaders are in one room then the words can be drafted by the group as a whole. If this approach is not possible, or if there is already general concensus among the participants on the business outcomes that can be achieved through an enhanced information base, the vision can be assembled and presented to the key business leaders for review and approval.
Step 4: Gain Executive Acceptance

It is important that acceptance be given for the vision by the various business leaders involved in developing it. Once again, the vision must be business-owned and business-led. Acceptance will help to ensure that each of the leaders involved will serve as a champion for building an enhanced information base in their respective business areas or regions.

PHASE 3: CHANGE STRATEGY

A successfully executed Information Vision development process will generate a significant amount of awareness among key business leaders of how information can be a strategic enabler for the company. However, it is important to build on the momentum that has been achieved and have a plan for making all company management aware of the vision for how information will be leveraged to create business value. Do not make the mistake of relying on passive or informal communication methods. Instead, a detailed communication plan should be developed to ensure that all key stakeholder groups are aware of the vision. Exhibit 8 highlights a simple approach for developing a communication plan.

Key Messages

First you must identify the key messages that you wish the target audiences to hear and understand. Given the visioning process that has just been completed, typical messages would include:
- Business Vision and Strategy — pick key phrases that link directly to the Information Vision
- Information Vision — emphasize that the statement has been developed and approved by key business leaders
- Business Outcomes — state the business outcomes that can result from developing an enhanced information base are key to making people understand how the vision will change the business

Audiences
Generally, all decision-makers in the company should be made aware of the key messages coming out of the visioning exercise. For the purposes of the communication plan, it is important to specifically identify those audiences that will require targeted communications. Once these audiences have been identified, it is a worthwhile exercise to determine the roles of each group with regard to their use of information and IT and gain an understanding of their specific communication requirements. For example, some groups may simply need to be made aware of the key messages while others may need to incorporate this thinking into their decision-making. The level of communication required for a specific audience will dictate the method used.

Communication Methods
Typically, there are a variety of communication methods available within a company ranging from media tools, such as e-mail or company newsletters, to face-to-face communications, such as executive presentations. It may be necessary to create some specific communication opportunities to match the objectives of the visioning initiative. Compiling a list of the various methods available will help in developing the communication plan.
Developing the Communication Plan

Assembling the communication plan involves determining which methods will be used to communicate the key messages to the target audiences.

Conclusion and Next Steps

Once the Information Vision has been developed and the communication plan has been launched, you may ask yourself, “where to from here?” Once again, given the momentum established during the visioning exercise, it is important to build on this momentum. The following are typical initiatives or deliverables that may provide further value to your company.

**Information Strategy.** Building on the stated business outcomes from the visioning exercise, an information strategy would provide further detail regarding what the specific information requirements are to achieve these outcomes. The strategy would answer questions such as: What knowledge is critical to the success of the company? How can this knowledge be leveraged further? What are the key strategic and operational decisions in the company? What information would enable these decisions to be made more effectively? An information strategy also provides detail regarding where IT investments should be targeted to deliver the greatest value to the company.

**Information Management Plan.** Once people acknowledge that information is a valuable resource for the company, they will begin to realize the importance of managing this resource effectively. An information management plan identifies how key information will be defined, managed, delivered, and protected. The plan also identifies who will be responsible for defining, managing, delivering, and protecting key information.