Influence and Leadership Skills for Architects: Driving Strategic Decisions

Itana Fall Face2Face 2016
EDUCAUSE Pre-Conference Seminar SEM04-F

Itana

Facilitators for the day

Jim Phelps
Dir. of EA & Strategy, UW
Chair, Itana

Chris Eagle
IT Strategist & EA, U-Mich
Vice-Chair, Itana

Louis King
Enterprise Architect, Yale
Steering Committee, Itana

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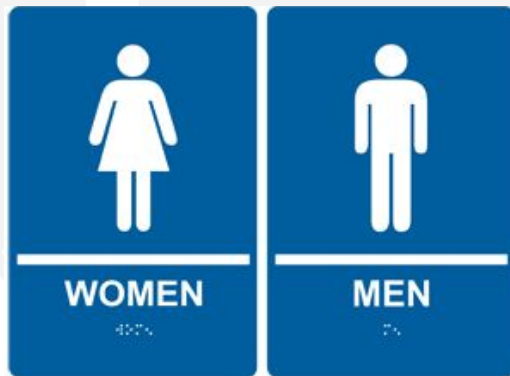Steering Committee, Itana

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Warmup: Introduce & Inquire

1. **Count off:** **1, 2, 3, 4,** 1, 2, 3, 4, 1, 2…

2. **Line Up:** **1s & 2s** across from **3s & 4s**

3. **Meet: 1s** go find someone across from you

4. **Inquire: Learn** something about each other

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Agenda

Time	Section	Facilitator
8:00 - 8:15 AM	**Into and Overview of the day** **Warmup: Appreciative Interviews**	**Jim**
8:15 - 9:00	**Flow & Facilitation**	**Jim**
9:00 - 9:45	**Interactive Case Study -** Strategic thinking exercise	**Louis**
BREAK		
10:00-11:00	**Leadership Panel** Florence Hudson - Sr. VP and Chief Innovation Officer, Internet2 Phil Reid - VP for ASA, AVP and Deputy CIO at UWash	**Jim**
11:00 - 11:30	Table discussions - Morning Take-Aways (W3) - **+, Δ, !, ?**	**Chris**
11:30 - 12:30PM	**Lunch**	

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Agenda

| Time	Section	Facilitator
12:30PM	**Gather**	
12:30 - 1:30	[Shift and share](#) case studies - Leadership/Facilitation Skills	
1:30 - 2:15	Case Studies in Contexts - 1, 2, 4 All	**Chris**
Break		
2:30 - 3:15	**Power of Storytelling**	**Chris**
3:15 - 3:45	**Reflecting on the contexts**: Broadest, Event, Individual - Lessons Learned about each context	**Jim**
3:45-4:00 pm	**Wrap-Up +, Δ, !, ?**	**Jim**

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Contexts:

Broad	Activity	Personal
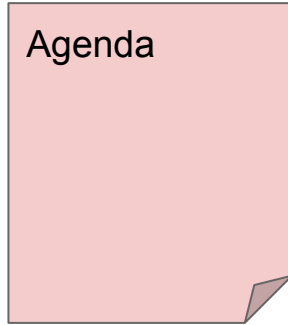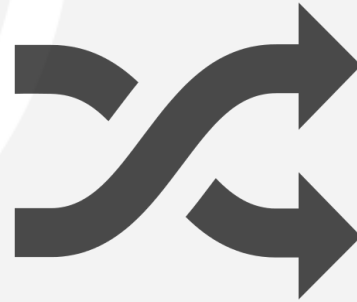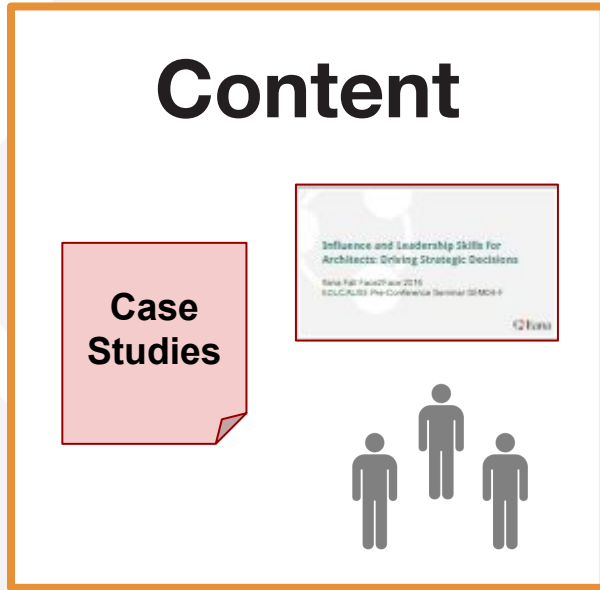
Reflection

Reflection: Important to learning

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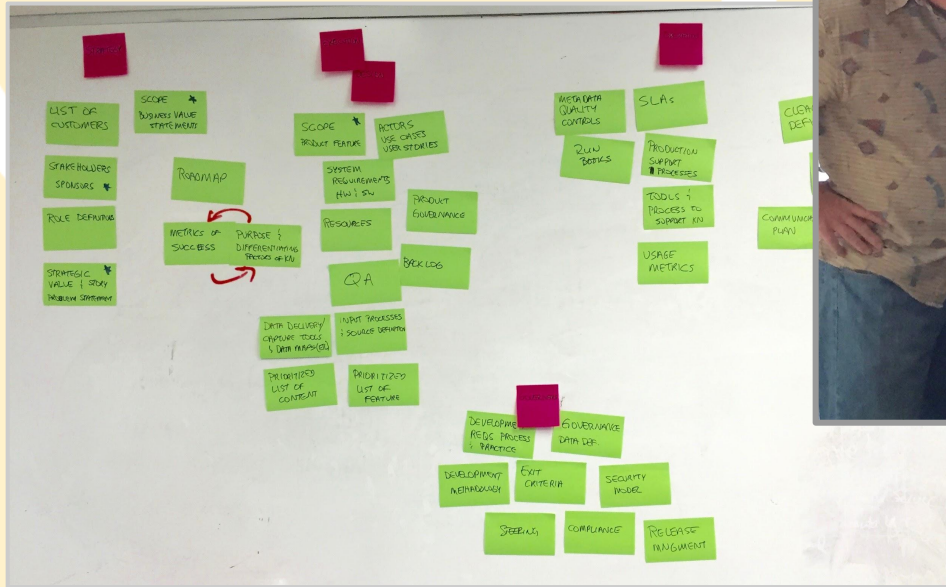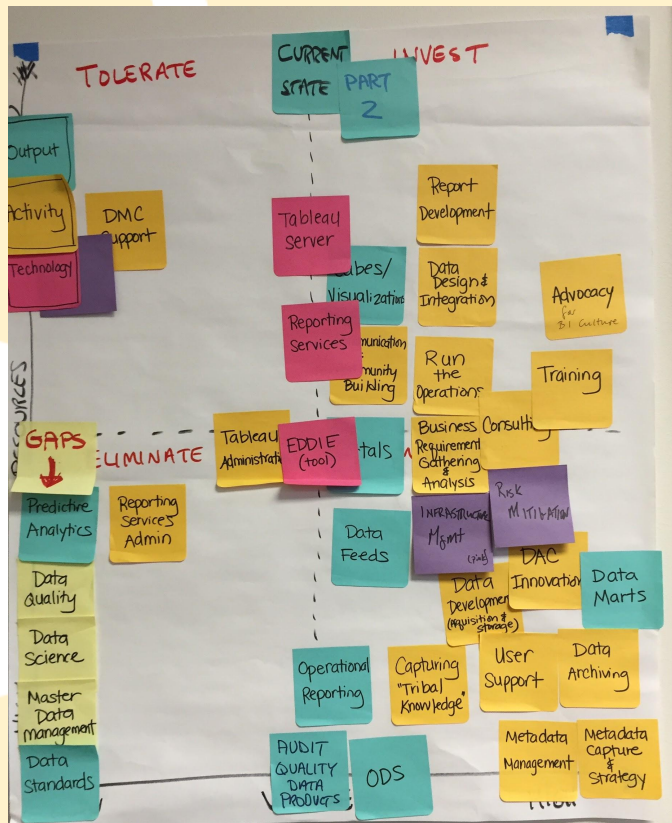
Reflection: Important for Inclusion
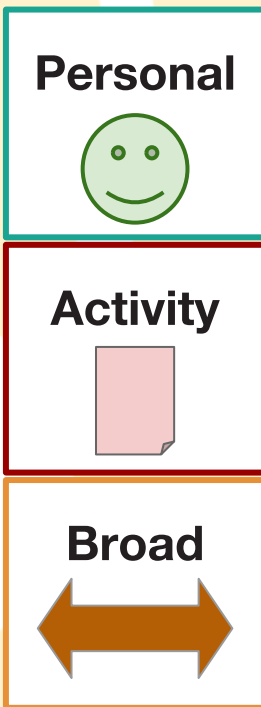
"I" Time
1, 2, 4, all

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Inclusion: Hearing all the voices

Inclusion: Hearing all the ideas

Two Topics:

Flow

Facilitation

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Future In Review: The Importance of Flow

BBC Business Daily Podcast:
http://www.bbc.co.uk/programmes/p048n34z

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The multiplier effect.

Revenue alone is not a great indicator of the value of company.

How you generate that revenue is also important.

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Four types of businesses:
(1) You manufacture something

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**Four types of businesses:
(1) You manufacture something
(2) You provide services to others**

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Four types of businesses:
(1) You manufacture something
(2) You provide services to others
(3) You create Intellectual Property

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Four types of businesses:
(1) You manufacture something
(2) You provide services to others
(3) You create Intellectual Property
(4) You orchestrate a network

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Four types of businesses:
(1) You manufacture something
(2) You provide services to others
(3) You create Intellectual Property
(4) You orchestrate a network

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Value of Companies is based on the type of business. The multiplier effect.

Type of Business	Value of the Company
Manufacturing	Value = 1 * revenue

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Value of Companies is based on the type of business. The multiplier effect.

Type of Business	Value of the Company
Service Providers	**Value = 2 * revenue**
Manufacturing	Value = 1 * revenue

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Value of Companies is based on the type of business. The multiplier effect.

Type of Business	Value of the Company
IP Creators	**Value = 4 * revenue**
Service Providers	Value = 2 * revenue
Manufacturing	Value = 1 * revenue

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Value of Companies is based on the type of business. The multiplier effect.

Type of Business	Value of the Company
Network Orchestrators	**Value = 8 * revenue**
IP Creators	Value = 4 * revenue
Service Providers	Value = 2 * revenue
Manufacturing	Value = 1 * revenue

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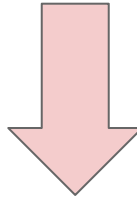# Nations and GDP

GDP Dominated by:
Network Orchestrators
IP Creators
Service Providers
Manufacturing

Restricted GDP Growth over time

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Nations and GDP

GDP Dominated by:
Network Orchestrators
IP Creators
Service Providers
Manufacturing
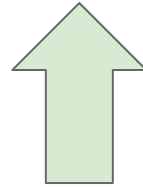
⬆ Accelerated GDP Growth over time

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Spring F2F 2016 - Architecture Leadership

Generate Ideas

Analyze & Communicate

Sell Ideas

Inspire Action

Sustain and Adjust

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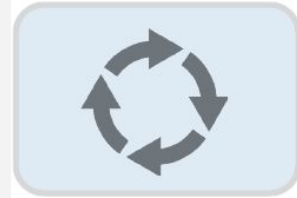
Spring F2F 2016 - Architecture Leadership

Measure Progress

Communicate Success

Plan and Run Meetings

Build Relationships

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Spring F2F 2016 - Architecture Leadership

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Spring F2F 2016 - Architecture Leadership

Generate Ideas

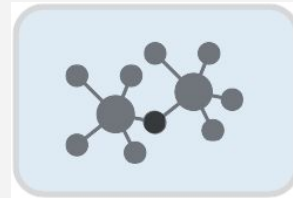**Analyze & Communicate**

Sell Ideas

Inspire Action

Sustain and Adjust

Measure Progress

Communicate Success

Plan and Run Meetings

Build Relationships

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EA Skills Across the Org

Itana Call - October 23, 2015

Jim Phelps

Function name

Function name

Function name

Function name

Triggers

Process Name

Activity

Activity

Activity

Results

(1) A possible trigger
(2) A possible trigger

(1) **Stakeholder:** The result for a stakeholder.
(2) **Stakeholder:** The result for a stakeholder.
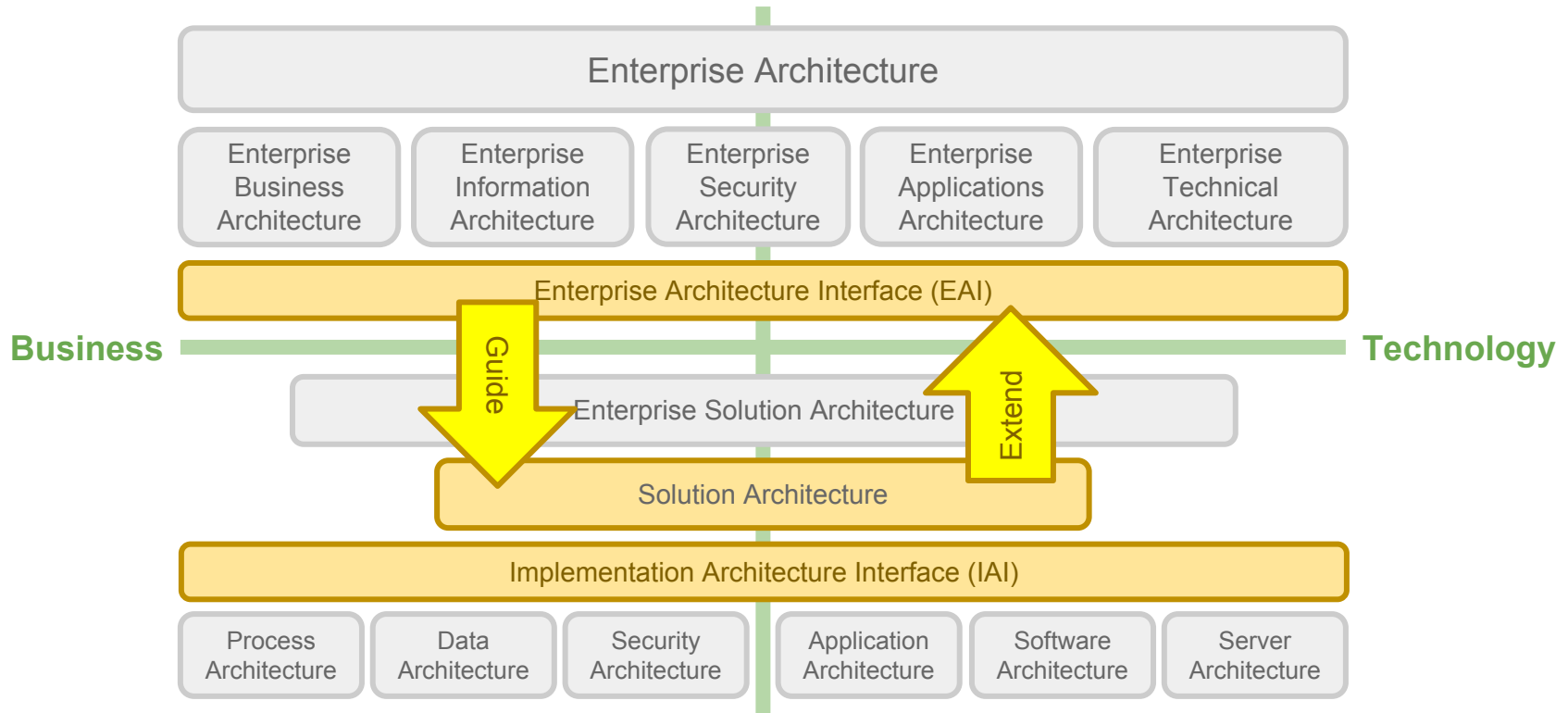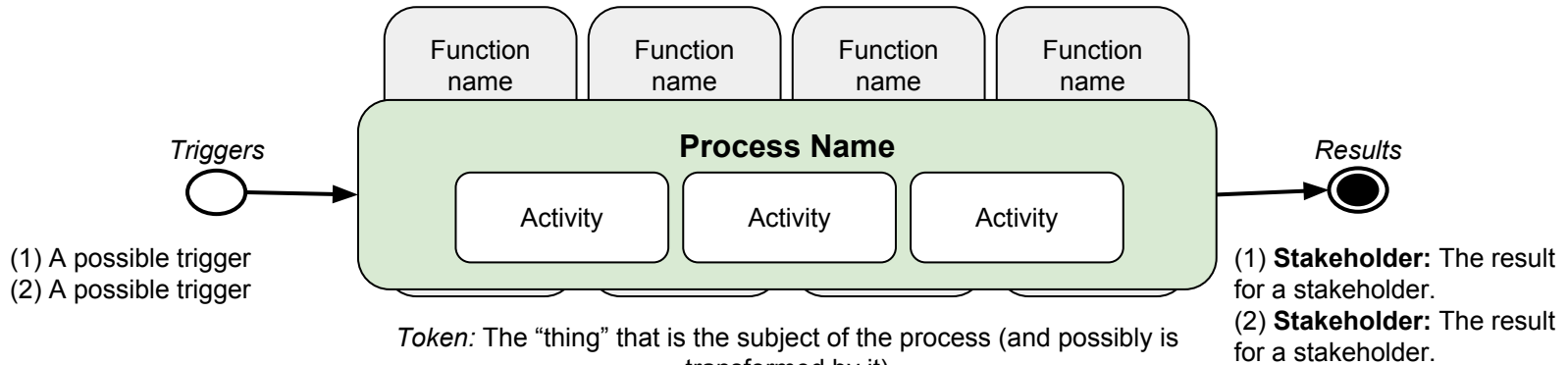
Token: The "thing" that is the subject of the process (and possibly is transformed by it)

Cases:

- List exceptions or alternatives to the "happy path" activities above
- ...

INFORMATION TECHNOLOGY

UNIVERSITY *of* WASHINGTON

Enterprise Architecture & Strategy

Capability Mapping Workshop

Leap Forward Day: Strategy on a Page Workshop
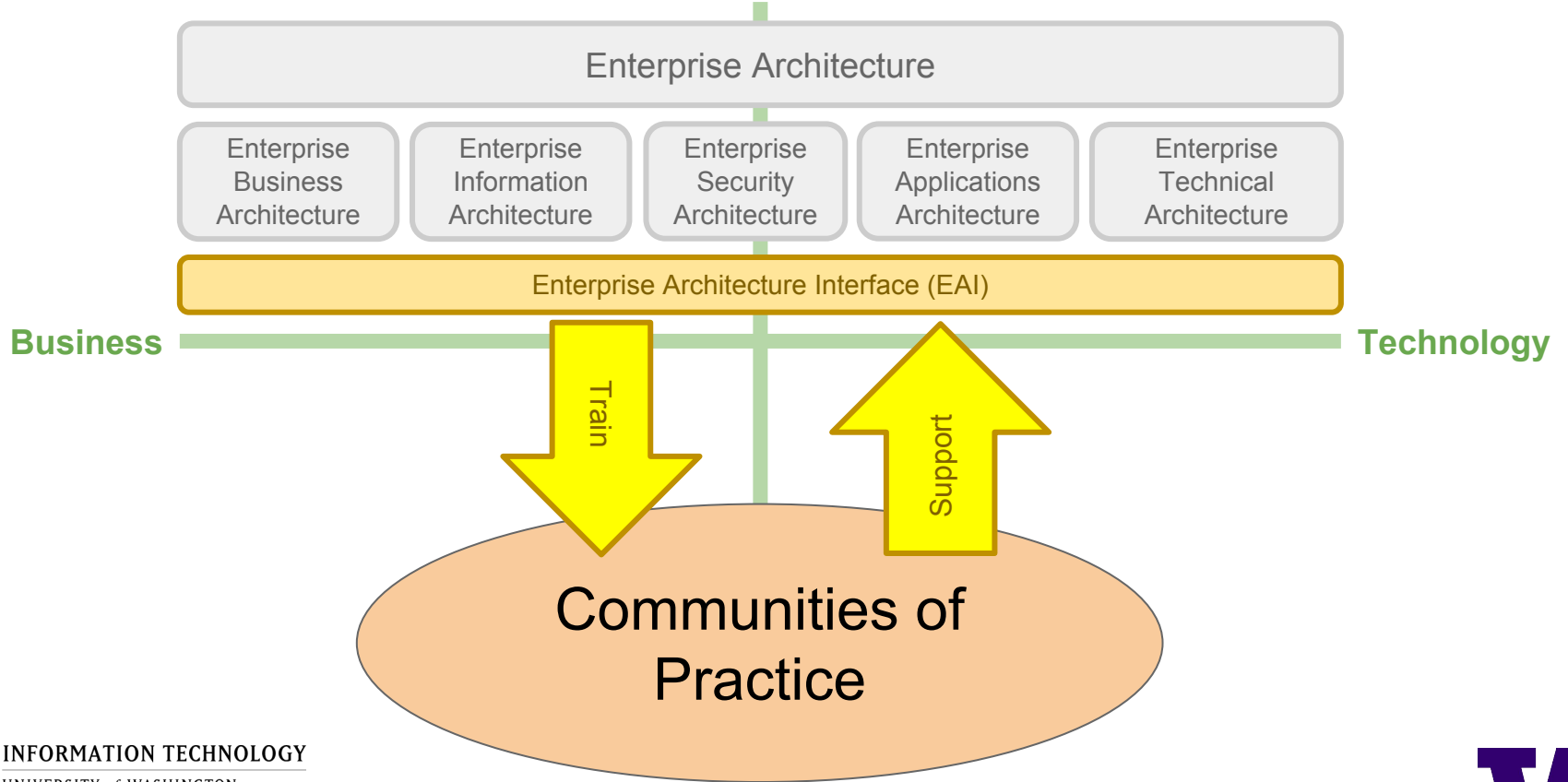
Value of Companies is based on the type of business. The multiplier effect.

Type of Business	Value based on revenue
Manufacturing	Value = 1 * revenue
Service Providers	Value = 2 * revenue
IP Creators	Value = 4 * revenue
Network Orchestrators	**Value = 8 * revenue**

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How we provide **8 times** more value than our **4 FTEs**.

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The Leadership Aspects of Architecture
Itana Fall Face2Face 2012

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Doing the right things vs. doing things right

"A leader's job is to make sure the organization does the right things while a manager's job is to make sure we do those things right."
Warren Bennis, Why Leaders Fail

Being visible & building followers

"The only true leader is someone who has followers...who do the right things...Leaders are highly visible."
Peter Drucker

Transform vision into action

"The essence of leadership is found in the ability to transform vision into significant actions. The two dimensions are vision and ability to implement."
William Hitt, The Leader Manager: Guidelines for Action

Solving adaptive problems

"In doing adaptive work, the problem is often unclear and therefore the solution is unclear. Adaptive work is generally messy work that requires persistence, creativity and courage to work through."
Ronald Heifetz et al,"Political Leadership: Managing the Public's Problem Solving"

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Leadership Competencies

Strategic Thinking

Change Management

Decision Making

Strategic Partnerships

Building Agreement

Persuasion & Communication

Shared Leadership

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Personal Skills

Strategic Thinking

Change Management

Decision Making

Building Relationships

Strategic Partnerships

Building Agreement

Persuasion & Communication

Shared Leadership

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Two Topics:

Flow

Facilitation

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Two Topics:

Flow

Facilitation

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UW-IT Facilitator Training 2016-17

Heidi Barta, Manager of Organizational Development, UW-IT

Jim Phelps, Director of EA & Strategy, UW-IT

UW-IT Facilitator Training Sessions

	Title
1	**Foundation1:** **Facilitator Role and Meeting Management**
2	**Foundation 2:** **Types of Meetings and Planning Techniques**
3	**Foundation 3:** **People and Dynamics**
4	**Foundations 4:** **Visuals and Virtual**
5	**Tools & Practices**
6	**Keep it Going**
+	**Cohort follow-on - CoP**

INFORMATION TECHNOLOGY
UNIVERSITY *of* WASHINGTON
Enterprise Architecture & Strategy

W

UW-IT Facilitator Training Sessions

	Title	Focus/topics
1	**Foundation1:** **Facilitator Role and Meeting Management**	Role of the Facilitator, Effective Meetings and the 5Ps, Preparing for a Meeting: Picking Space, Grab and Go Bag, Room set-up
2	**Foundation 2:** **Types of Meetings and Planning Techniques**	Types of meetings, Facilitation Plans, Storyboards, Stickynote exercises. Goals, Activities and Outcomes.
3	**Foundation 3:** **People and Dynamics**	Group Dynamics, Dealing with Difficult People, Mediating Conflict, Team Dynamics. Introverts vs. Extroverts. "I" Time.
4	**Foundations 4:** **Visuals and Virtual**	Handouts, Presentations, Visuals in Room, Learning Styles Virtual Meetings, Virtual attendees
5	**Tools & Practices**	Stakeholder Input, Data Collection & Analysis, SWOT & Root Cause, Measuring Impact, Flowcharting & BP Mapping
6	**Keep it Going**	Ideation, Decision Making and Consensus, Strategic Planning, Lessons Learned Maintaining your practice: re-order list, restocking, etc
+	**Cohort follow-on**	Community of Practice. Shadowing. Triad coaching/mentoring.

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Reason to Focus on Facilitation

Maximize Time in Meetings

83% - Drift from the subject

77% - Poor preparation

74% - Questionable effectiveness

68% - Lack of Listening

62% - Verbose participants

60% - Length

51% - Lack of participation

Source: Achieving Effective Meetings - Not Easy But Possible, Bradford D. Smart in a survey of 635 executives

3	**Foundation 3: People and Dynamics**	**Group Dynamics, Dealing with Difficult People, Mediating Conflict, Team Dynamics.** Introverts vs. Extroverts. "I" Time.

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| 5 | Tools & Practices | **Stakeholder Input**, Data Collection & Analysis, **SWOT & Root Cause**, Measuring Impact, Flowcharting & BP Mapping |

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6	**Keep it Going**	Ideation, **Decision Making and Consensus, Strategic Planning, Lessons Learned** Maintaining your practice: re-order list, restocking, etc

Leadership Mindset

Effective Organization

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+	**Cohort follow-on**	Facilitator Alliance.
		Community of Practice.
		Shadowing.
		Triad coaching & mentoring.

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The multiplier effect.

Network Orchestrators	Value = 8 * revenue

Interactive Case Study

Strategic Thinking Exercise

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Strategic Thinking Session 1

1. I-Time to write forces and trends on stickies (5m)
2. Post stickies, organize into categories and title them (5m)
3. Pick top item, write headline and select a reporter (5m)

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Strategic Thinking Session 2

1. Share and draft current state thoughts on easel pad (5m)
2. Develop tactics to change from current state to future state, write up strategy/tactics and select a reporter (8m)

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Strategic Thinking Session 3

1. Quick report outs - Future State and Strategy (8m)
2. Discussion (5m)

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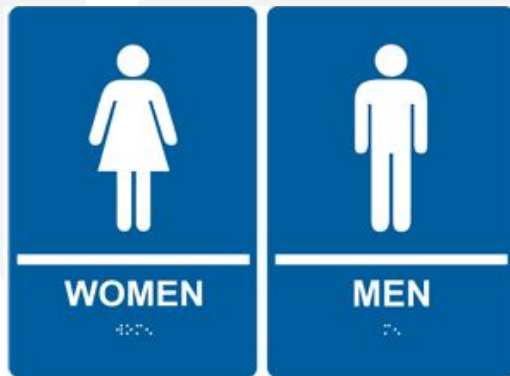
Leadership Panel

Florence Hudson

Senior Vice President and Chief Innovation Officer,

Internet2

Phil Reid

Vice Provost for Academic & Student Affairs and Deputy CIO,

University of Washington

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What, so what, now what?

- Flow and Facilitation
- Strategic Thinking
- Leadership Panel

For each:
- What did you notice? What stood out?
- Why is this important?
- What actions can this motivate in your or others?

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3:45-4:00 pm	**Wrap-Up +, Δ, !, ?**	**Jim**

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Shift & Share Case Studies

Shift & Share Case Studies

The Development and Use of a Capability Map at Miami University
Dana P. Miller, Business Analyst, Miami University
Daniel Black, Enterprise Data Architect II, Miami University

Influencing Strategies
Louis King, Enterprise Architect, Yale University

Service Portfolio Templates
Luke Tracy, Enterprise Data Architect, University of Michigan

Facilitating Major Change with Metadata
Ray Polakovic, Enterprise Information Architect, University of Washington

Facilitating Collaborative Development with Micro-services and Open Source
Jim Hedwig, MyUW Lead Strategist, University of Wisconsin

Reference Architecture for Hybrid Integration
Ashish Pandit, IT Architect, University of California, San Diego

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What, so what, now what?

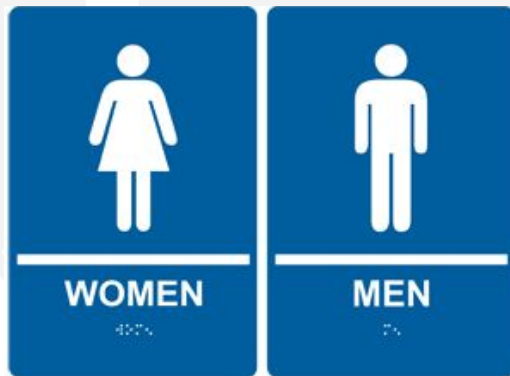Shift and Share presentations:

- What did you notice? What stood out?
- Why is this important?
- What actions can this motivate in you or others?

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The Power of Storytelling

Itana Face2Face
Sept. 2016

REPORT
EXHAUSTIVE

PRESENTATION
EXPLANATORY

STORY
DRAMATIC

Source: Resonate, Nancy Duarte, 2010

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UNIVERSITY OF MICHIGAN
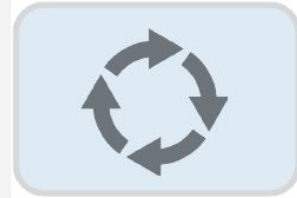
product.com

Presentation, 10/18/16

Product.com history

- Contract signed in 2014; entering 3rd and final year (8/11/17 end date)
- Funded now by the Medical School, LSA, and Stamps
- Total cost of ~$x per FTE, licensed per FTE whether they use it or not
- Open to all faculty and staff
- The Hospital pays its own license agreement (excluded from statistics slides)
- Recent purchase by Superproduct.com

Product.com - experience and statistics

- Annual license cost of $xx,000

- Distinct times used in FY16: 10,366 (7,950 in FY15)
  - About $x per use

- Distinct users in FY16: 3,600 (2,977 in FY15)
  - About $x per user

Product.com - FY16 usage

VP Area	Distinct Times Used	Percent of Site Used	Unique Users	Hours Used
Academic Affairs	5,377	52%	1,489	4,398
CFO	2,075	20%	643	1,926
Medical Affairs (excl Hospital)	1,431	14%	471	1,332
Flint	445	4%	112	399
Student Affairs	343	3%	146	243
Office of the President	203	2%	61	101
Other	492		179	

Unit	Uses	Users	Hours
Med (no Hosp)	1,431	387	1,332
LSA	1,368	364	1,037
Library	485	117	395
Stamps	401	88	331
Engineering	358	136	247
Rackham	322	63	312
ISR	233	107	245
Public Health	232	76	209
Ross	219	88	155
Dentistry	216	52	193
Arch & Ur Pln	202	39	184

Unit	Uses	Users	Hours
Information	202	46	183
Music	177	40	141
SNRE	137	26	146
Education	103	28	73
DEI	97	21	90
Life Sciences	90	10	33
Social Work	60	25	34
Law	54	18	88
Kinesiology	18	6	20
Public Policy	39	18	56
Nursing	32	13	14

FY16 Usage

Product.com - FY15 usage

VP Area	Distinct Times Used	Percent of Site Used	Unique Users	Hours Used
Academic Affairs	4,225	53%	1,391	3,386
CFO	1,487	19%	646	1,373
Medical Affairs (excl Hospital)	1,058	13%	458	783
Flint	281	4%	106	232
Student Affairs	280	4%	131	183
Office of the President	160	2%	63	86
Other	459	6%	182	243

Unit	Courses	Users	Hours
Med (no Hosp)	881	365	690
LSA	907	317	643
Library	560	110	506
Stamps	418	83	370
Engineering	305	142	200
Rackham	126	42	100
ISR	300	118	234
Public Health	142	78	90
Ross	134	70	78
Dentistry	95	22	124
Arch & Ur Pln	115	41	112

Unit	Courses	Users	Hours
Information	145	43	156
Music	143	34	131
SNRE	36	26	20
Education	54	19	44
DEI	18	6	29
Life Sciences	37	10	16
Social Work	115	39	93
Law	54	21	37
Kinesiology	21	12	9
Public Policy	37	16	43
Nursing	39	15	29

FY15 Usage

Product.com - experience and statistics

- Four ways to use Product.com (employee, workstation license, etc.)
  - All employees (faculty and staff) - not temporary employees
  - Workstation license - starts at $xxx/year/device
  - Person license for a named individual - starts at $xxx/year/person
  - Student accounts for a group of students - starts at $xx/student/month for up to 6 months

- Marketing to date
  - CIO newsletters
  - Symposium poster
  - Instructional Design SIG

Product.com - next steps

- Are we seeing value from the license?
- Are we interested in continuing?
- How can we make sure staff know about this offering?

- If yes,
- Who will help fund extension?

The big idea
of this presentation

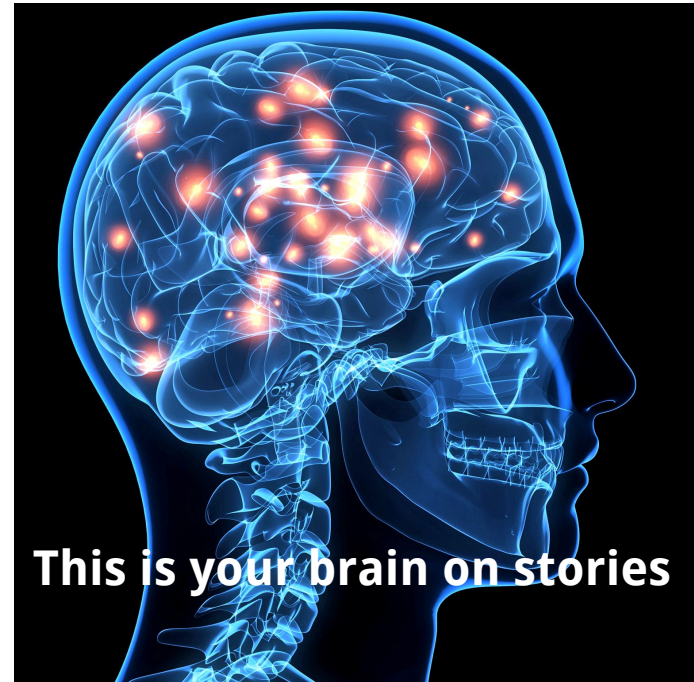You will be able to use storytelling techniques to get better results from your formal communications, especially when they involve sharing data.

Why Stories?

- Stories make a point

Why Stories?
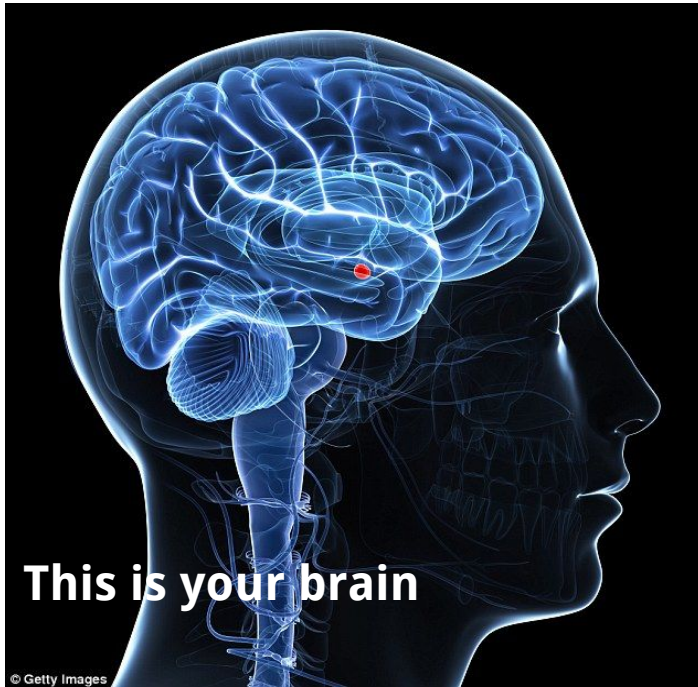
This is your brain

This is your brain on stories

Why Stories?

- Stories make a point
- Stories are memorable
- Stories motivate people
  (through emotional connections)

Narrated by Dan Heath, Co-author of Switch, 2010

Why Stories?

- Stories make a point
- Stories are memorable
- Stories motivate people
  (through emotional connections)

The three little pigs

The three little pigs

Housing Material Distribution
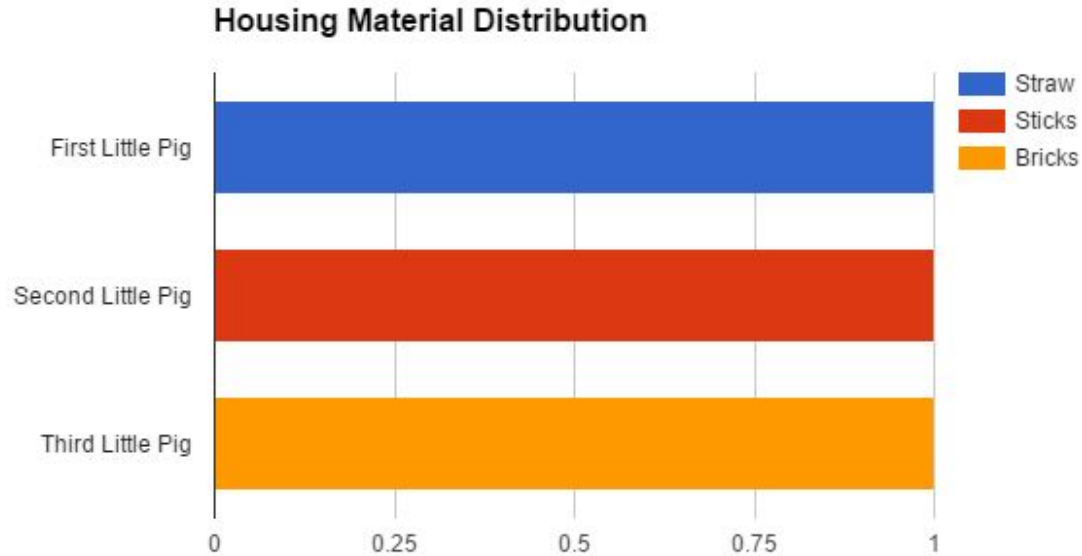
The three little pigs
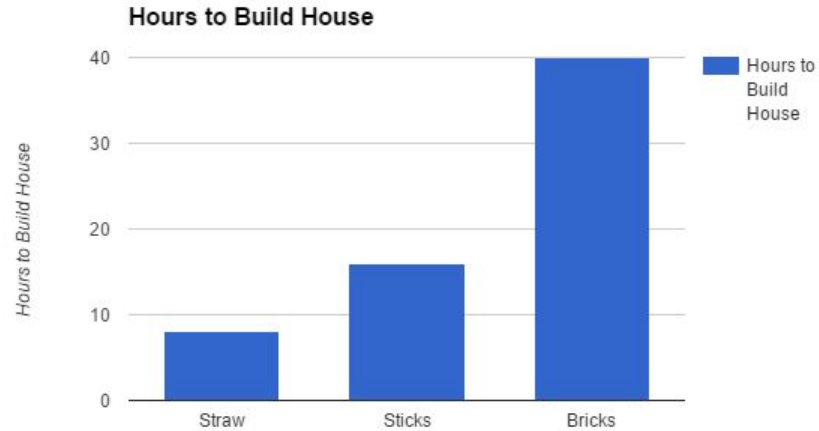
The three little pigs
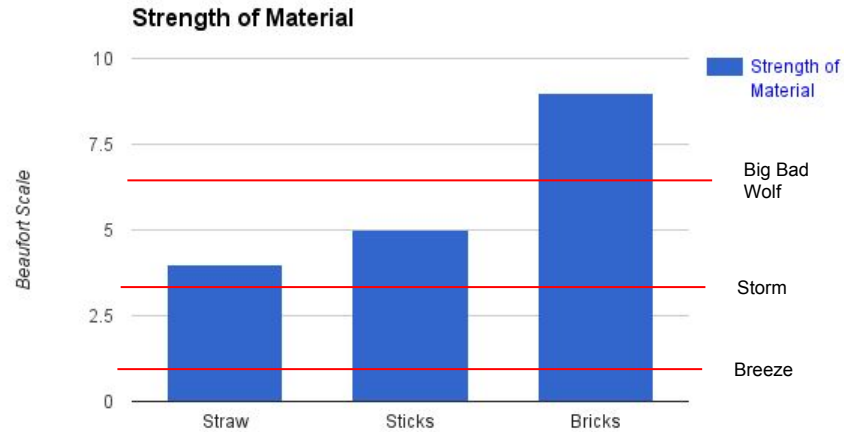
The three little pigs
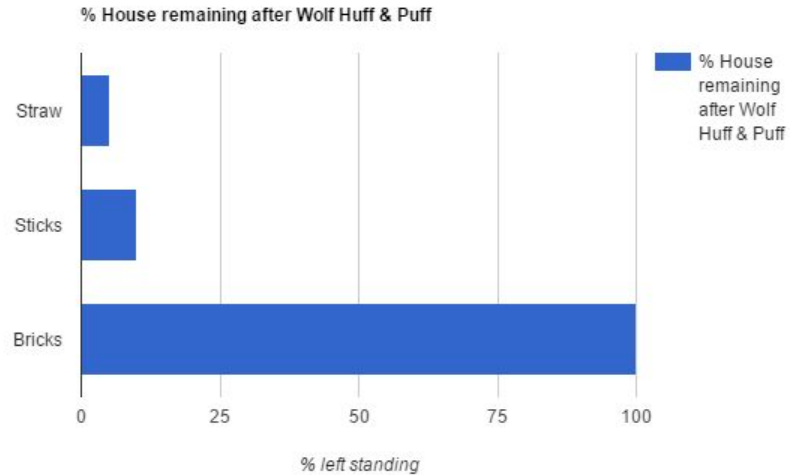
Next Step

Further evaluate effort of using bricks vs. risk of Wolf event

Spring F2F 2016 - Architecture Leadership

Generate Ideas

Analyze & Communicate

Sell Ideas

Inspire Action

Sustain and Adjust

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REPORT EXHAUSTIVE — **PRESENTATION** EXPLANATORY — **STORY** DRAMATIC

Source: Resonate, Nancy Duarte, 2010

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How to tell a story
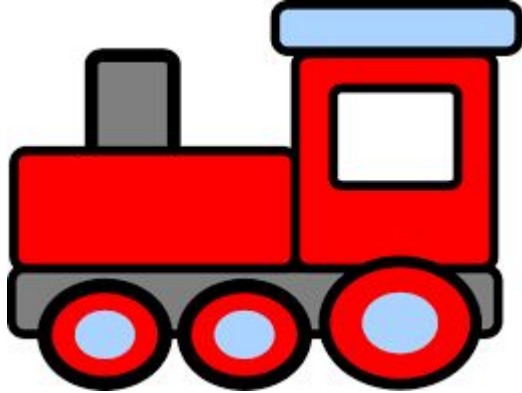
Beginning

Introduce a hero and
a premise
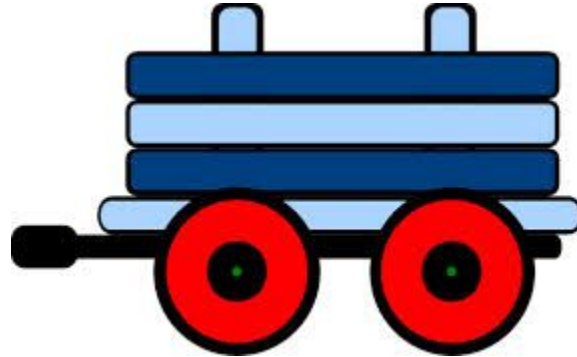
Middle

Introduce conflict
and tension

End

Resolve the tension
and make your point

RELATABLE AND LIKEABLE HERO	**ENCOUNTERS ROADBLOCKS**	**EMERGES TRANSFORMED**
Snow White **Situation:** Snow White takes refuge in the forest with seven dwarfs to hide from her stepmother, the wicked queen.	**Complication:** Snow White is more beautiful than her stepmother, the queen, so disguised as a peddler, the queen poisons her with an apple.	**Resolution:** The prince, who has fallen in love with Snow White, awakens her from the spell with "love's first kiss."
E.T. **Situation:** A group of alien botanists visit earth. After a hasty takeoff, one of them is left behind. And he wants to get back home.	**Complication:** Ten-year-old Elliott forms an emotional bond with E.T., a task force tries to hunt down E.T., and he and Elliott get very sick.	**Resolution:** E.T. and Elliott build a communication device and escape on a bicycle. E.T. is rescued and tells Elliott he'll be in his heart.
Avatar **Situation:** Jake Sully is a paralyzed ex-Marine who is selected for the Avatar program, which will enable him to walk through a proxy Na'vi body in the land of Pandora.	**Complication:** Jake falls in love with a Na'vi woman, Neytiri, in Pandora. As the humans encroach on the forest seeking valuable minerals, Jake is forced to choose sides in an epic battle.	**Resolution:** Under Jake's leadership, the Na'vi defeat the humans. Jake is permanently transformed into a Na'vi and gets to live on Pandora with Neytiri.

Source: Resonate, Nancy Duarte, 2010

Ticket Trend
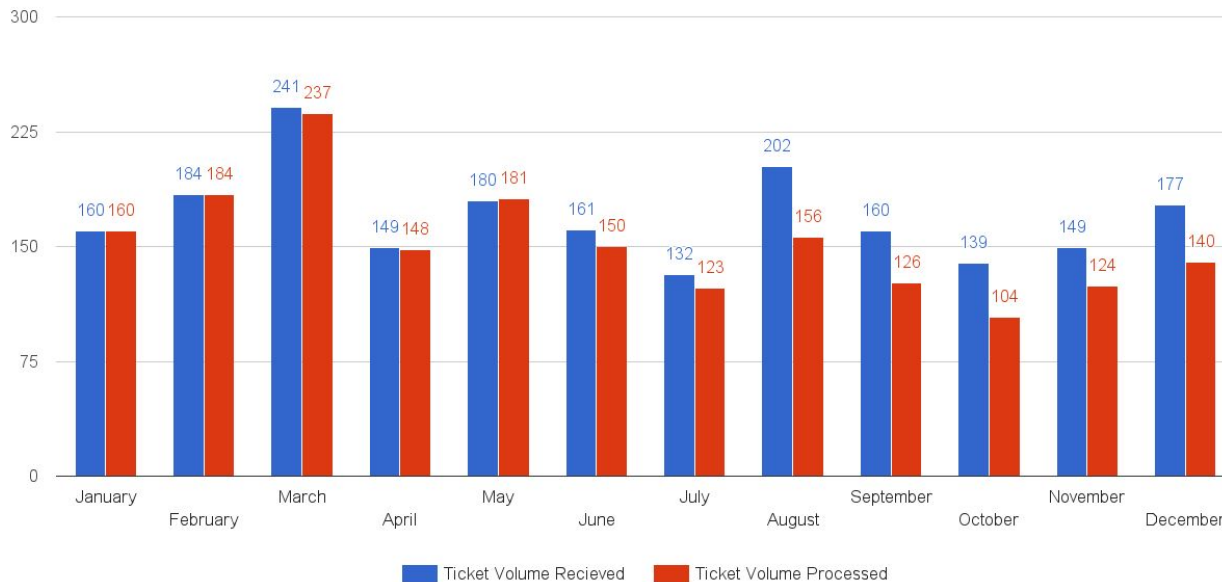
Source, Storytelling with Data, Knaflic, 2015

Please approve the hire of 2 FTEs

to backfill those who quit in the past year

Ticket volume over time

2 employees quit in May. We nearly kept up with incoming volume in the following two months, but fell behind with the increase in Aug and haven't been able to catch up since.

202

160

177   Received

130   149

156   Processed

126   124   140

104

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

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2016
DART

Legend:
- 🟢 Recommended
- **Not Recommended**
- 🚫 Not Recommended
- ⊙ Evaluating
- ⚫ Retired

Data points:
- BBEC
- BBDW
- BBDM
- Wealth Point
- BBIS
- AddressFinder
- GiftWrap
- Luminate TeamRaiser
- Target Analytics
- Ruffolo Cody
- MarketingCloud
- Kintera Sphere

Axes: Usage (vertical), Lifecycle (horizontal)

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2016 + 3 years

DART

Recommended

Not Recommended

Not Recommended

Evaluating

Retired

Summary

The University recently made a significant investment in our enterprise CRM for fundraising. We chose BlackBaud because it is a flexible technology that will allow us to more easily integrate other tools. BlackBaud's products will remain at the heart of our development systems strategy. We will be incorporating other tools around these base products.
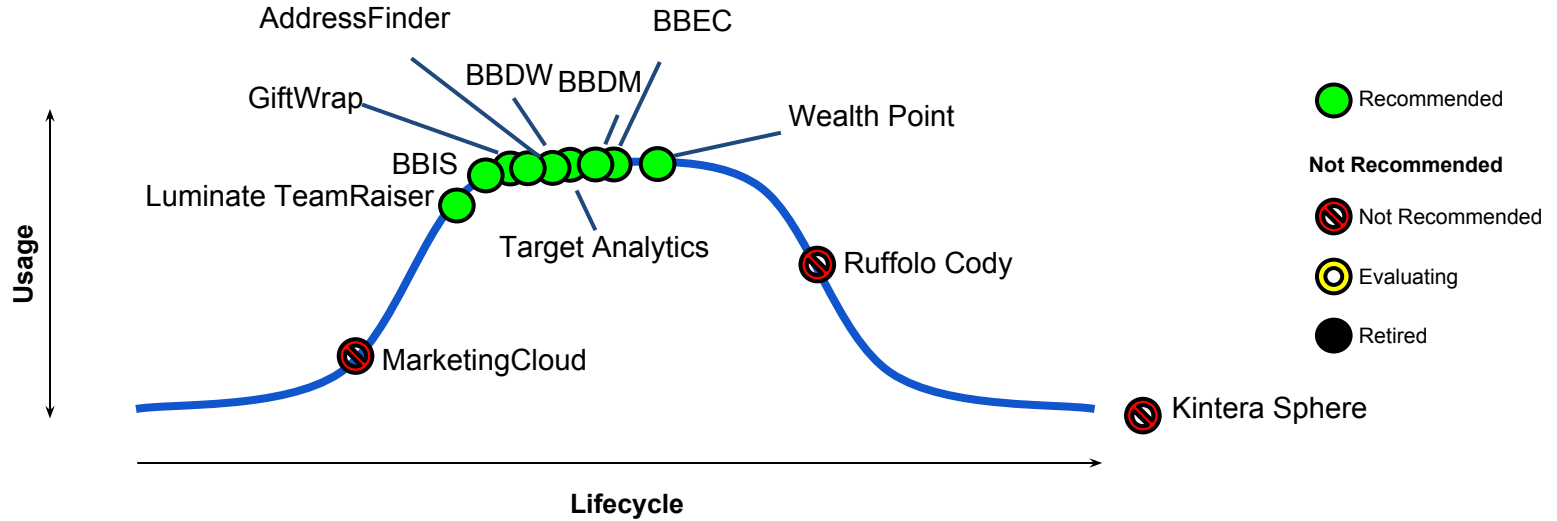
Roadmap
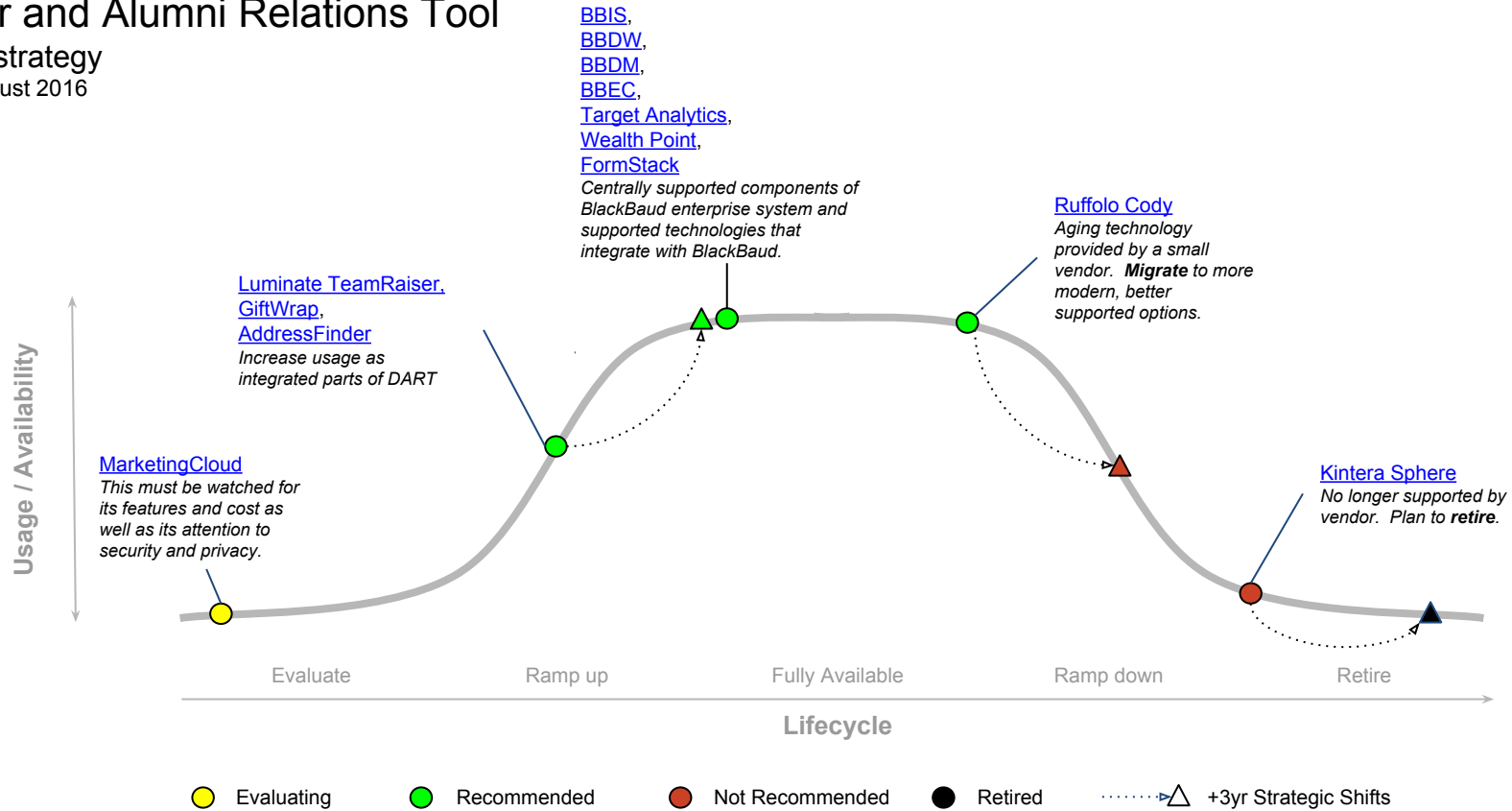
- Retire Kintera Sphere
- Evaluate other solutions and possibly retire Ruffolo Cody
- Leverage integration of AAUM's implementation of SalesForce for possible future enterprise CRM
  - Evaluate replacement of BBDM with MarketingCloud
- Evaluate other online engagement offerings and utilize enterprise service bus (ESB) strategy to integrate with DART

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Donor and Alumni Relations Tool

3 year strategy
As of August 2016

BBIS,
BBDW,
BBDM,
BBEC,
Target Analytics,
Wealth Point,
FormStack
Centrally supported components of BlackBaud enterprise system and supported technologies that integrate with BlackBaud.

Ruffolo Cody
Aging technology provided by a small vendor. **Migrate** *to more modern, better supported options.*

Luminate TeamRaiser,
GiftWrap,
AddressFinder
Increase usage as integrated parts of DART

MarketingCloud
This must be watched for its features and cost as well as its attention to security and privacy.

Kintera Sphere
No longer supported by vendor. Plan to **retire**.

Usage / Availability

Evaluate — Ramp up — Fully Available — Ramp down — Retire

Lifecycle

○ Evaluating   ● Recommended   ● Not Recommended   ● Retired   ⊳△ +3yr Strategic Shifts

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Employee Satisfaction Scores

Survey category

Department	Upper Mgmt	Climate	Super-visor	Auto-nomy/Involve-ment	Work-load	Re-sources/Envir-onment	Recog-n ition	Co-Workers	Comm-unicatio n	Training & Devel-opment	Task Significa nce	Comp-ensation	Benefits	Advance ment	Survey Percep-tion
Dept Alpha	61	67	74	68	65	75	67	77	62	67	79	61	79	60	60
Dept Bravo	63	69	78	71	64	75	69	81	63	66	78	62	81	59	60
Dept Charlie	57	65	76	77	64	73	70	79	67	76	82	74	78	65	56
Dept Delta	57	65	73	66	56	76	60	74	54	61	75	62	82	59	63
Dept Echo	70	75	81	75	68	85	79	83	74	66	85	64	79	69	43
Dept Foxtrot	73	78	84	79	66	74	75	82	72	67	82	68	81	65	62
Dept Golf	69	72	78	76	69	78	72	83	64	71	78	64	81	60	64
Dept Hotel	70	74	77	72	67	82	71	84	66	71	81	67	84	65	60
Dept India	60	63	77	65	59	71	68	79	61	62	78	53	81	54	59
Dept Juliet	53	66	77	67	62	72	64	79	57	58	72	60	79	55	59
Dept Kilo	73	77	84	79	71	76	78	82	79	74	83	73	81	67	67
Dept Lima	69	81	85	78	73	76	75	86	76	76	84	68	85	63	65
Dept Mike	64	67	82	69	64	70	61	84	59	58	62	66	79	60	51

Green: Improved since last survey   Red: Declined since last survey
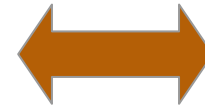
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Table Discussion: 1, 2, 4, All

+	Δ
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