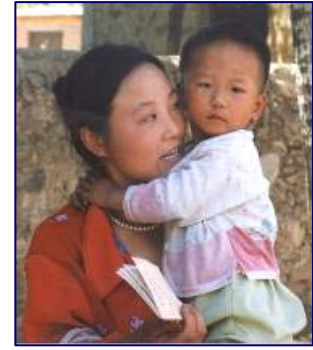




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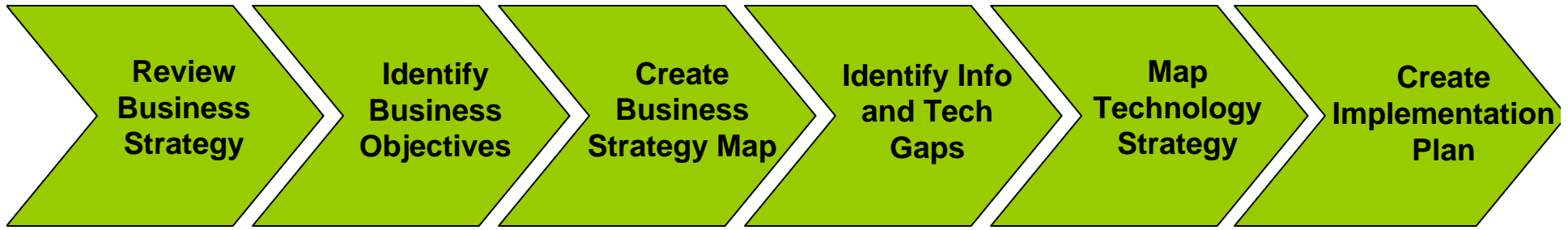
Technology Strategy Methodology

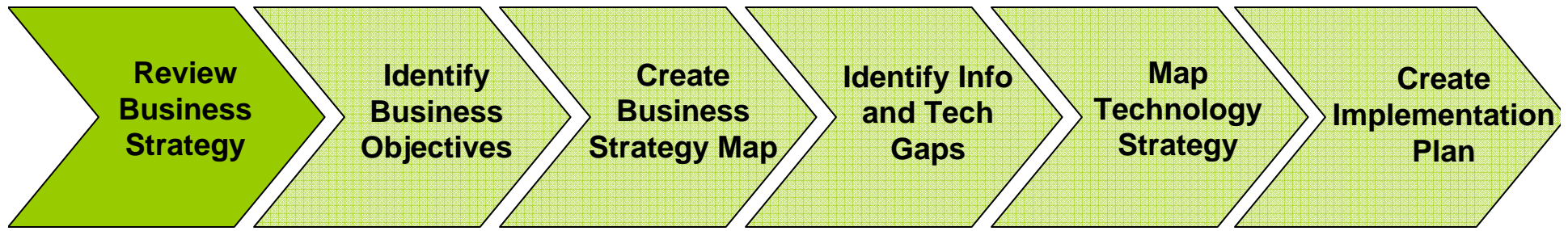
Introduction: Shifting our View of IT



- **IT is not just computers and email**
- **But the solutions to that enable staff to run their business efficiently**
- **And the solutions that allow MFIs to manage our most important business asset, information**
- **So how do we make sure that IT is being used to correctly?**
 - that it is being used to help the staff run their business efficiently, and
 - That it is being used to collect and care for the critical information needed to direct business decisions?
- **By creating an Information Technology Strategy that directly supports the Business Strategy of the MFI**

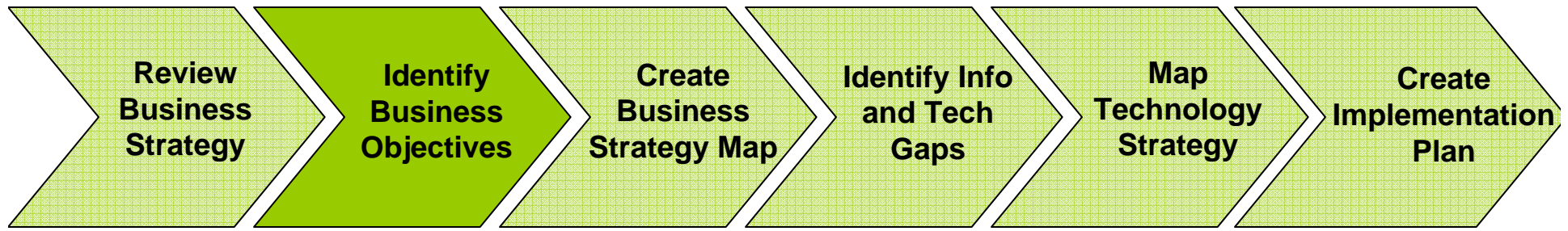
Methodology





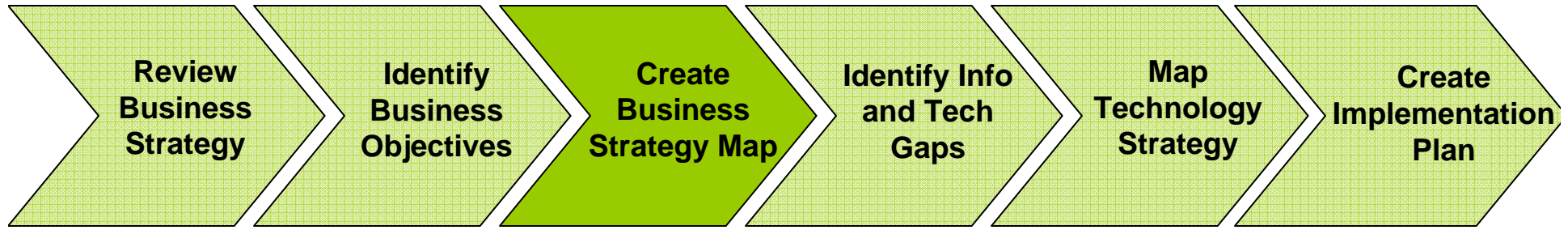
Review the Business Strategy

1. Identify the business goals of the organization
 - Interview executive team
 - Understand 1 and 5 years goals
 - Identify the information and initiatives / projects needed to achieve goals
2. Identify the Department-level goals
 - Interview heads of departments
 - Understand responsibilities of each department
 - Understand 1 and 5 year goals
 - Identify the information and initiative / projects needed to achieve goals
3. How does your MFI operate today? What are the core business processes? Who are your core partners? Who are your core customers and how do you service them?



Identify Business Objectives

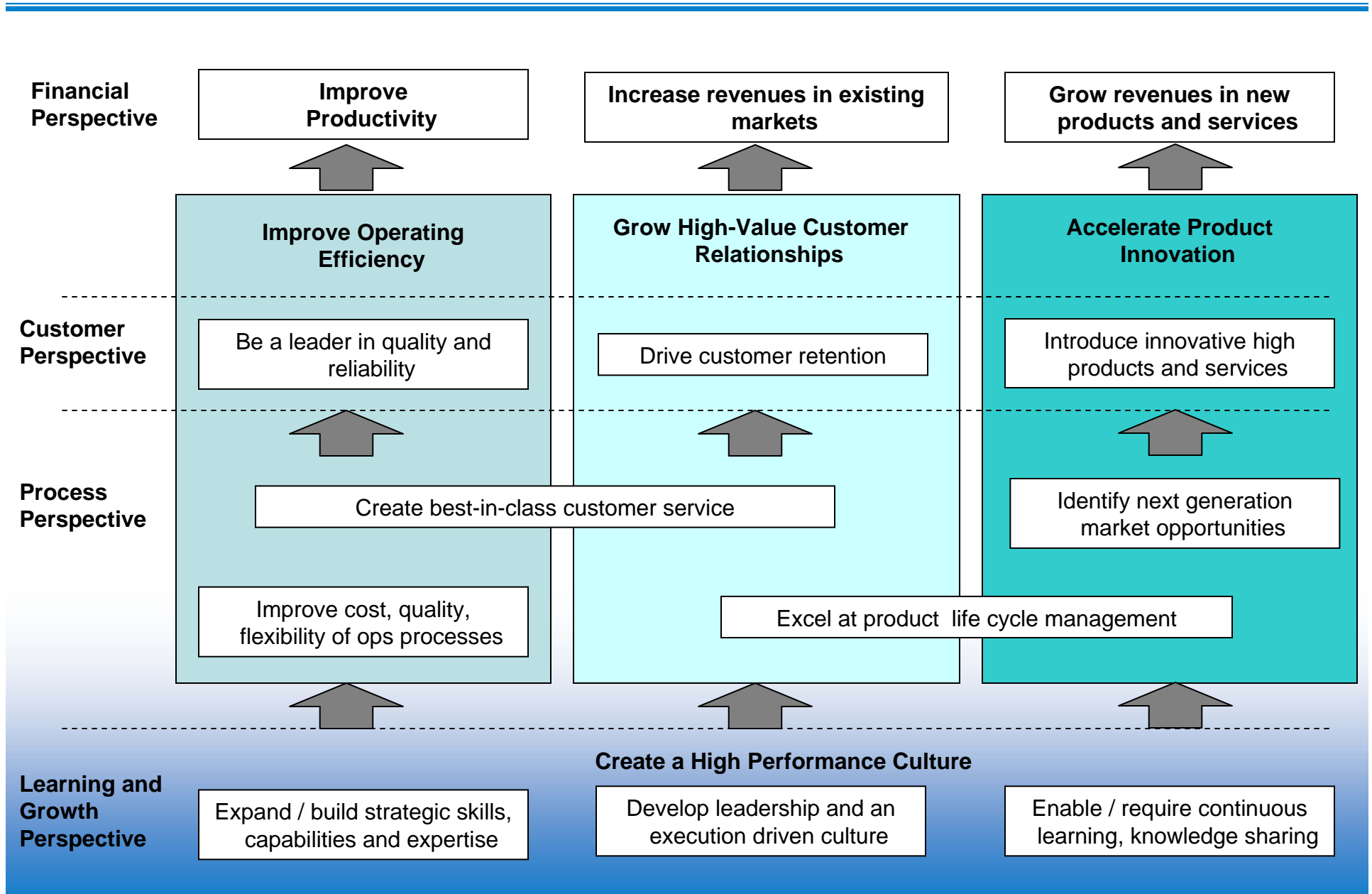
1. Based on interviews, create a set of 10-15 business objectives
 - Client Perspective (How should the MFI look to its customers?)
 - Financial Perspective (How should the MFI look to its donors and investors?)
 - Internal Processes (At what internal operations must the MFI excel in order to satisfy your clients?)
 - Building for the Future (How must the MFI learn and improve?)

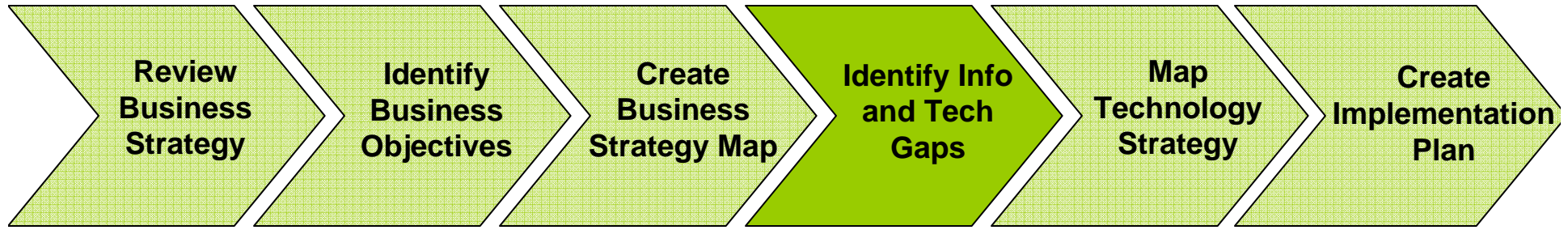


Create Business Strategy Map

1. Align the business objectives with cause-and-effect linkages
2. (See next page for an example)

Example Strategy Map





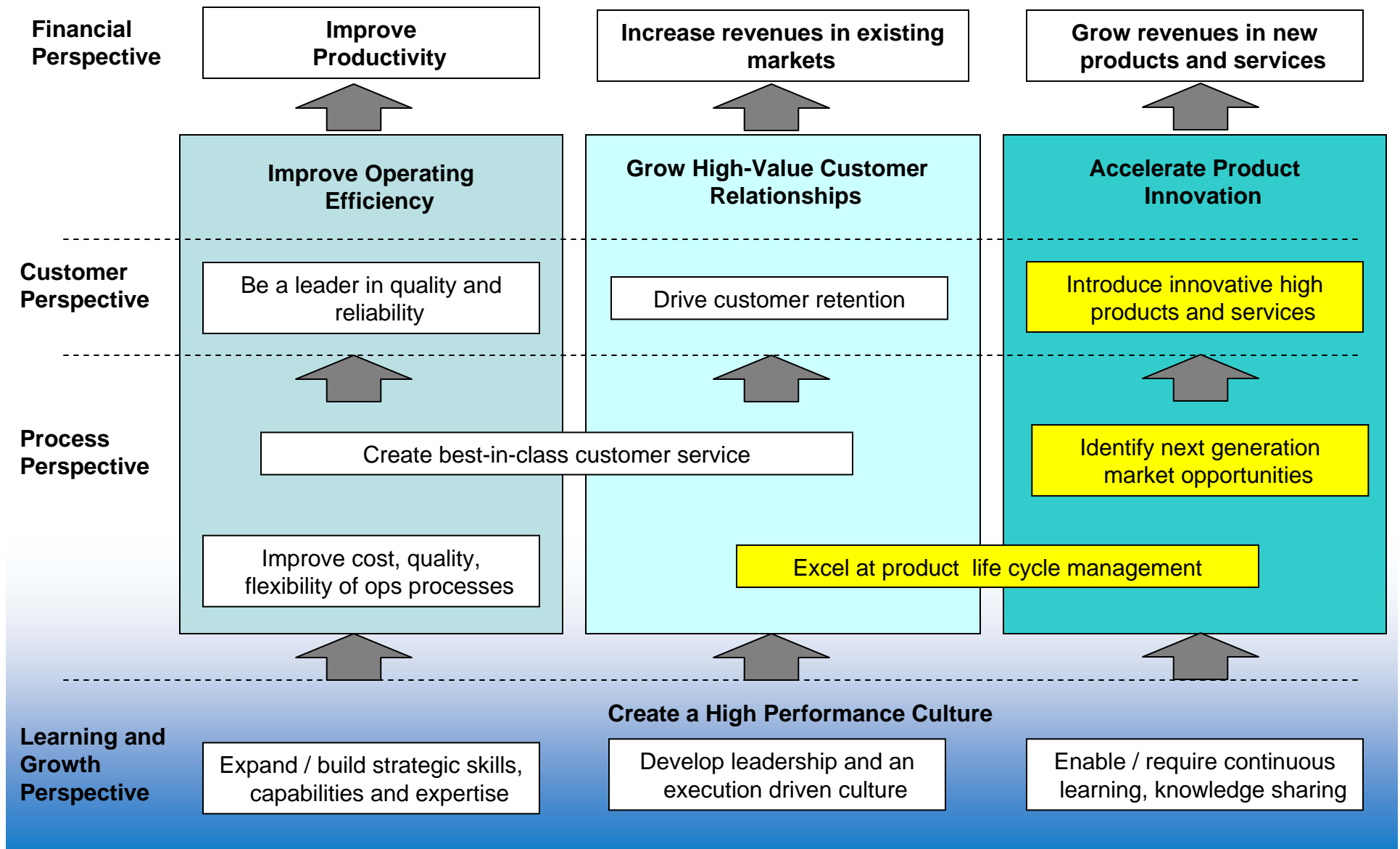
Identify Information and Technology Gaps...then Brainstorm!

1. During interviews

- Identify the *information* needed to achieve business objectives
- Identify the *technology* needed to achieve business objectives

2. Consolidate currently planned technology solutions and brainstorm new technology solutions that *fill the gaps*

Example: The *objectives* of the business plan become the *goals* of the IT strategy...

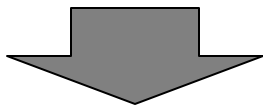


Example: Use Business Objectives to Identify Technology and Information gaps



Business Objectives = IT Goals

Introduce innovative high performance products and services
Excel at product life cycle management
Identify next generation market opportunities

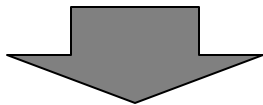


What are the gaps?

Understand the clients product needs and wants

Reduce product development cycle time

Evaluate the success and failures of existing products



IT related projects to fill gaps

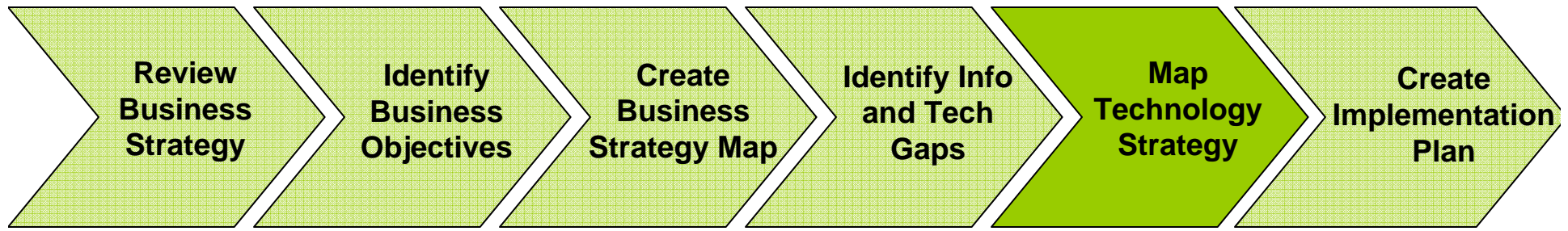
Establish an automated way to collect Client Data

BPR project focused on product development

Create business intelligence platform (data warehouse and ad hoc reporting tools)

Create data warehouse for data storage and analysis

Implement ABC product costing to understand profitability



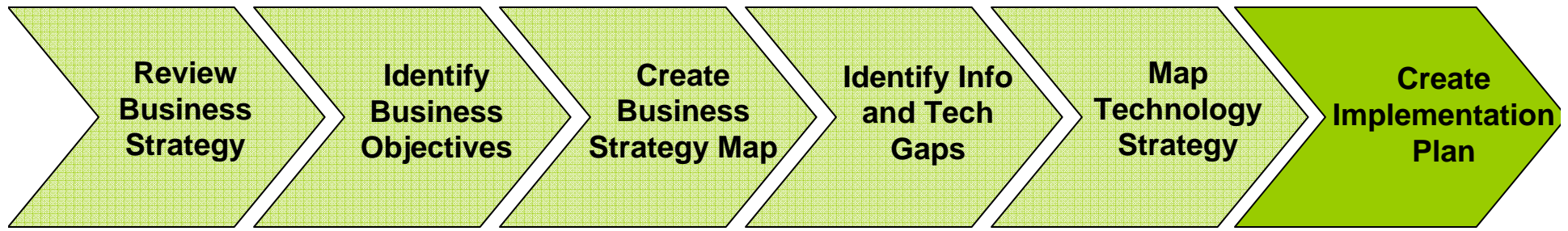
Map Technology Strategy

1. Consolidate all planned and potential IT initiatives
2. Create the business objective/IT initiative matrix
3. Identify the most important IT initiatives (which IT solutions will meet the most business needs?)

Example: Business Objective & IT Initiative matrix



Objectives	Centralized MIS	Front End Solutions	Enhance MIS to collect client data	Data Warehouse	Ad Hoc Reporting tools	Reengineer Product Dev Process	ABC software	HRIS	New Website	Upgrade infrastructure
Be a leader in quality and reliability		X								X
Create best in class customer service	X	X								X
Improve cost, quality, flexibility of operations processes	X	X								X
Drive customer retention	X	X	X		X	X				
Excel at product life cycle management				X	X	X	X			
Introduce innovative products and services			X	X	X		X			
Identify next generation market opportunities			X	X	X					
Expand / build strategic skills, capabilities and expertise								X		
Develop leadership and an execution driven culture								X		
Enable / require continuous learning, knowledge sharing								X		



Create Implementation Plan

1. Create a 3-5 year implementation roadmap showing when each technology initiative should be completed
2. Include resource considerations