INSTRUCTOR: Christopher A. Kowalsky, CDP
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PREREQUISITE: None

READINGS:
Corporate Information Strategy and Management Text and Cases

Various course materials are contained in the course Blackboard Lecture Notes, Handouts, and Assignment sections.

WEB ACCESS:
- www.computerworld.com
- www.wikipedia.com
- www.whatis.com
- www.cio.com

PERIODICALLY:

GRADING:
- Final Exam 64 Points
- 2 homework assignment papers 2, 6 Points
- Group Project 16 Points
- Class participation 12 Points

COURSE FOCUS:
Increasingly organization survival and/or efficiency are related to the ability to acquire and maintain excellent information about itself and competing organizations. Information treated as a resource for strategic planning and operational management has a value like other assets in the organization. The information asset must be quantified and accounted for as such assets as land and equipment. Once information is placed in the proper perspective, management issues regarding the creation and protection of information assets become relevant and important. More than ever there appears a need for faster access to critical information by all of the decision makers, of the quality and quantity that is needed to make better decisions. This course will explore necessary management actions, which will insure that information is available, correct, manipulatable, protected, and archived in proper forms. All levels of management have the burden of insuring that appropriate information systems are in place to bring about a productive profitable organization. Management is accountable. The objective of this course is to meet the challenges which are seemingly unending. Information Technology Services departments will be required to increase system performance and improve availability while simultaneously cutting costs and improving quality, measured by customers satisfaction. The use of best practices methods and metrics must be considered for improvement for already in place. Information technology professionals need to acquire business skills to compliment their traditional technical skills. We will learn how these business skills can be applied effectively to cut Information Systems costs and improve the quality without reducing services.
COURSE ADMINISTRATION:
This course will include lectures, videos, in-class discussions, case studies, presentations, guest speakers, student research, and a group project.

Attendance is required for the entire period each week. We all will appreciate students being ready for the class start at 5:30.

Except for the first class, all assigned chapters, case studies, and other readings are to be read before coming to class. Due to the variety of subject matter covered and the necessity of continual learning to update oneself, there is a significant amount of material to be read in this course.

All written assignments are to be turned in on or before the assigned due date. Assignments submitted after this time but within one week will receive one half credit. Assignments submitted after this time will receive no credit.

Students will be asked to research and present relevant articles for discussion in class, participation points can be acquired through this activity.

On the first evening, we will discuss the course and school policy regarding the very serious matter of student cheating and plagiarism. Students found cheating at any time will be dismissed from this course and receive an F.

Regarding in class recording of lectures: "No student may record or tape any classroom activity without the express written consent of Christopher Kowalsky. If a student believes that he/she is disabled and needs to record or tape classroom activities, he/she should contact the Office of Disability Resources to request an appropriate accommodation."

CLASS SCHEDULE:
Week 1, The Challenges of Managing Information Systems and Technology
Read: Introduction Chapter

Objectives: Understand how IT can add value;
Determine the many components of IT management;
Realization of the many stakeholders responsible to create IT success.

Assignment (2 pages):
Topic: Information Technology Planning Process. Interview an organization for the purpose of documenting their I.T. planning process - who what, where, why, when, how? If possible determine links to the organization's strategic plan. Due for classroom discussion in week 2, Any person not currently employed may join with a person who is employed or see me personally for other alternatives. A few students will be asked to present their findings and solutions.

In Class video "Innovative Technology " What are the issues and service levels? In-Class assignment: Determine the IT and business related challenges emerging.
Strategic Information Systems Plan: IT Strategy and Organization Strategy

Read: Chapter 1, 2, 4 and Bb handout: Fidelity Investments;

Objectives: Understand how IT should be planned in organizations which the use of IT varies in value and needs.
Learn how to determine if the organization uses IT strategically or in support only.
Determine what is to be contained in an IT Strategic Plan. Learn how the industry standard COBIT can assist in determining the overall IT strategy and execution.

Video: Professor Warren McFarlan “Strategic Planning” reasons and examples.

This lecture will concentrate on the need for and development of an IT Strategic Plan.

Read Bb handout: Federal Express and Wal-Mart IT direction, organization involvement and support, and CIO vision and responsibilities.

Objectives: Understand management’s role in providing IT value and success; key involvement initiatives and monitoring activities will be explored; How successful IT plans are created and managed using real examples.

Research "Managing Information Systems Priorities by Committee". The need for IT Governance.

Guest Speaker: Steve Agnoli, CIO of Kirkpatrick, Lockhart, and Gates.

Class discussion: First paper, IT Planning Process investigation.

Assignment: Group project to be assigned, "Evaluation of IT Strategic Plans and Initiatives and Organization Business Continuity Awareness and Plans”. Due: Week 6. Each group will present their findings and recommendations.

Top management must be involvement for successful information technology development and management. Successful implementation and use of Information Technology can be traced to management direction and oversite. This lecture will explore the various ways to create and maintain success.
**Week 3**

**Chief Information Officer (CIO) and The Information Services Resource**

Chapter 8,9

Read Bb handout: CIO Reporting Model and CIO of the Year, Fed Ex Rob Carter

Read Bb handout: IT staffing, organizing IT and risk management


Objectives: Determine key skills, traits, levels of experience enabling the CIO to be successful. Understand the support area skills of the IT department, staff retention and overall management requirements, and how the IT organization structure is designed based on the type of industry, business use of IT, and strategy deployed. Critical assessment of sourcing IT support and technology and related decision making and outsourcing management.

**Guest Speaker:** Gene Trudell, CIO of USS. IT quality and customer satisfaction.

The lecture will develop the scope of responsibilities of the top I.T. leader and associated support staff. The skills, traits, and unique staff requirements will be addressed. We will discuss how the IT leadership and the IT staff will be successful and add value to the organization. Also personnel selection and job enrichment will be explored.

**Organization Issues in Information "Systems Development Life Cycle". Insuring IT productivity and high quality performance through use of best practices.**

Systems Development priority setting criteria; Quality and Productivity Process, such as CMU’s Comparibility Maturity Model CMMi, ITIL, and ISO 9001-2000. Research (web sites below can be a starting point) the above methodologies before class.

Access: www.sei.cmu.edu/cmmi
http://www.iso.org/iso/en/ISOOnline.frontpage

Read Bb handouts: Six Sigma (lean), ISO, CMMI, and ITIL materials

Objectives: Learn how higher level of quality is achieved by the use of best practices. Understand how best practices can be implemented into the IT organization successfully.

To ponder and discuss: Do organizations have a choice, quality or speed of delivery or can both be obtained?
Weeks 4 and 5, Organization and IT Security Management Processes
Chapter 6

Guest Speaker: An expert with IT security will speak with us regarding policies, vulnerabilities, technologies, and processes to insure organizations are properly protected.

Access: www.securityfocus.com
http://www.sans.org/top20.htm
www.cert.org
www.issa.org
http://isc.sans.org/
http://www.sarc.com/
http://searchsecurity.techtarget.com/

Objectives: Understand why organizations are at high risk and exposure due to the continued expansion of technology for employees and customers.

Learn management functions to accommodate dependency on technology increasing at most organizations due to the integration of technology with nearly all aspects of personal and on the job life. Immediate system response and continuous availability is a requirement.

This lecture will address the necessary policies, processes, technologies, and people needed to be in place in order for organizations to have confidence that IT security is appropriate. Laws protect people that have their information in organizations data bases. Organizations are at risk if a security awareness and protection program does not exist. Management of services levels to manage the customer needs will be reviewed.

Information Technology Acquisition, Vendor Relationships and Contract Negotiation
Chapter 7
Read: Various Lecture notes on Request for Proposal and Contracts.
Assignment: Analyze vendor contracts, due in two weeks.

Objectives: IT procurement is a science and can end up being an economic advantage to the organization with some best practices for purchasing, to manage relationships, and to reach mutually acceptable agreements. Understand the need for service level agreements (SLA’s) and develop best practices stipulations (see p. 347) to be inserted in contracts. What is learned will be reinforced with homework assignments to simulate real business activities.

This lecture will address the necessity of using a structured, controlled approach to selecting hardware, software or consulting services. Tools, techniques and methods will be explored. We will discuss how to negotiate a contract, which will be to our
organizations advantage. Once the contract is signed the proper form of project management will be discussed to bring about an on time, on budget implementation.

**Week 6,**

**Information Asset Controls, Data Center Management, and IT Outsourcing**  
Chapter 9  
Case 3-5, p. 577-589

**Video:** Major Insurance Company Data Center Operations

**Guest Speaker:** William Schlegel, Audit Manager from E&Y will discuss the reasons I.T. departments and procedures are audited at least every two years.

Objectives: Understand how IT is audited to insure information assets are accurate and are protected. A Data Center is a processing facility such as a factory with many complex processes and management activities. How to insure cost efficient management functions occur at all times is the focus of the lecture. Any part of IT functions can be outsourced. The chapter and lecture will explore when outsourcing is appropriate and the many management considerations required for success.

**Project Management  A Portfolio Approach to Managing IT Projects**  
Chapter 10  
Access: [www.pmi.org](http://www.pmi.org)  
[http://associate.com/gantt](http://associate.com/gantt)  

Objectives: Learn best practices for project management and IT leadership. “If you are not creating a plan, you are planning to fail”. The class will explore the need for project management outsourcing and how to insure that the organization creates the appropriate business relationships with each provider of IT services.

Project management and leadership areas to be discussed such as:  
- Project management Institute’s (PMI), Project planning techniques (GANTT, PERT) Structured Walk through, and Management of Package Software (Implementation, Enhancement, Conversions and training considerations).

Project management considerations and approaches will be covered as a major success factor to achieve expected use of information technology.

**Disaster Planning, (Business Continuity Planning)**

Review the following web sites:  
Access: [www.dri.com](http://www.dri.com)  
[www.dri.ca](http://www.dri.ca)  
[www.contingencyplanning.com](http://www.contingencyplanning.com)

Objectives: Understand why IT dependency creates the need to manage in an environment which provides for failover to technology in the event of an unusual situation. Learn how this requirement comes about and how is it known that it works when needed.

The critical need of a detailed, formal business recovery plan will be discussed in association with the governing law. Procedure creation will be reviewed in conjunction with a case study delineating a real business recovery, which occurred a short time ago.

Video: "Back in Business"

Week 7, Evaluation of I.S. Strategic Plans and Business Continuity Preparedness Plans
Review Case: UCB: Managing Information for Globalization and Innovation (p. 591)
Group Presentations
Final research topic presentations
Open discussion regarding best practices to insure organizational success with IT.
Review for Final

Week 8, Final Exam
The Final exam will be composed of various essay questions. Questions will cover all course content.