MANAGE

I.T.

A Step-by-Step Guide to Help New and Aspiring IT Managers Make the Right Career Choices and Gain the Skills Necessary for Peak Performance

JOE SANTANA & JIM DONOVAN
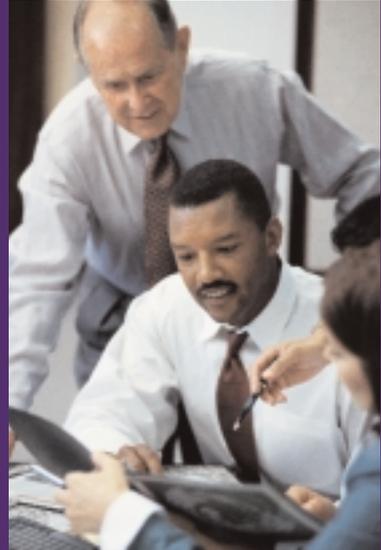
READER PRAISE FOR MANAGE I.T.

"This easy to read, practical book bridges the gap between management and tech-nology skills. Reading Manage I.T. and applying the principles it contains will make you a better manager and help you add more value to your organization. I highly recommend it.

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DR. DONALD J. CALISTA, DIRECTOR GRADUATE CENTER FOR PUBLIC POLICY MARIST COLLEGE

"New I.T. managers will get a lot of value out of this book. It's packed with prac-tical guidance from the real-world experiences of Joe and Jim and the best part is that this guidance can be deployed immediately."

DR. JON COUTURE, SENIOR VICE PRESIDENT HR SIEMENS BUSINESS SERVICES, INC

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FOREWORD

This is a practical, easy to use, book that will help your career and bring you greater happiness and balance in your life, while increasing the value you add to your company. We will start you on your personal journey by sharing our many years of experience and expertise to guide you first, with a look inside yourself to see if a career in IT management is the right choice for you. Then, if you decide that IT management is right for you, read on and we will show you, in simple and straight-forward language, how you can acquire the key skills you need to get on the fast-track to peak performance.

For example, you will learn:

• How to use simple models to gain focus, perspective and direction in your new role as a manager and leader of a team.

• To seize as opportunities, and gain benefits for yourself and your team, from changes in the IT space that have disrupted others.

• Where to go to get up-to-date, specialized information so you can continue to develop your new skills and remain on the leading edge in the I.T. space.

If you are currently trying to decide if you should accept an IT management position, read this book before you decide. If you are a new IT manager, read this book and get a fast start. If you are a "seasoned" IT manager, read this book and become a better one. If you are helping someone decide whether they should become and IT manager and/or helping them transition into the role of an IT manager, read this book with them and use it as the basis for training and coaching them through the process.

We highly recommend reading and rereading this book and completing the exercises because it is packed with information that you can put to use immediately and continue to use throughout your entire IT management career.

Joe Santana and Jim Donovan

INTRODUCTION

Learning is not compulsory... neither is survival.
W. Edwards Deming

This book was written for newly promoted IT managers or candidates considering the leap into management. Our purpose is to help you determine whether going into IT management is the right choice for you, and if you decide that it is, to give you a basic grounding in the new skill set and mindset that you will need to achieve peak performance in your new career.

According to a major study, every year American companies lose $350 billion due to having disengaged employees (The Gallup Management Journal Online Columns). The primary reason for these employees being disengaged is the lack of management and leadership ability among the ranks of their direct managers. Nowhere is this problem of weak management ability more painful and prevalent than in Information Technology.

The key reason for this is that the skills of an IT manager are so different from those of an IT practitioner (which we sometimes refer to as a doer) that experience and success in the latter do not prepare one or indicate ability for success in the former. Furthermore, the entire process of promoting new IT managers from the ranks of IT professionals is, at best, weak, even among some of the most enlightened organizations. Many companies will simply "anoint" the new IT manager and expect him/her to "learn the ropes." "She was a great programmer, so she will be a great IT manager," you often hear. And so, every year, thousands of companies promote star technical performers into IT management roles, with high expectations that they will automatically "figure out what to do" and love their new bigger-title job. What will happen in most cases, however, is easily predictable. As they move through this unguided promotion process into the role of IT manager, many formerly confidant and stellar workers will become less-than-stellar managers.

These new and unhappy IT managers will then repeat the classic blunders of their equally unguided predecessors, and rack up a sizable portion of that $350 billion per year expense. Given the huge importance of IT alignment and the necessity for strong leadership in order for a company to successfully execute its strategic

plans, the true impact most likely exceeds even this hefty price tag. Worse still, the individuals who left their successful positions as high-quality technology performers to become poor-performing managers also suffer in terms of personal confidence, happiness, and in some cases, the derailing of what otherwise could have been a successful non-managerial career.

The good news is that if you have been recently offered a promotion to IT management or are a potential candidate for a management position, there is a great deal you can do to keep your career on track.

Avoid having your promotion become a career disaster

There are two very important things that you can do to avoid career disaster. First and foremost, make sure that IT management is the right move for you. Moving from a role as a technical professional to a role as the manager of technical professionals is a big decision. It will place a huge demand on you to learn new ways of working and thinking. If your core values and needs are not satisfied by the demands and rewards of an IT management position, we can guarantee that you will not be successful and that you will become progressively more unhappy.

Secondly, if you decide that IT management is the right career move for you, approach it with the understanding that even though you are working for the same company, you are, in effect, starting a new job. You will no longer be the top technician, but rather an entry-level manager. Your new job will require new skills as well as a new mindset. Be open, prepared to learn, and prepared to abandon your old role completely.

Experts in Human Capital Management today are rapidly recognizing that the model of assessing an employee's need for orientation, coaching, support, learning, and development, based on how long the person has been with the company, tends to fall short. Under this old model, your need for orientation was thought to end upon the completion of a ninety-day career with the company.

After that, you were a member of the team who knew his/her way around. If you were promoted to a new role a year later, you were expected to simply hit the ground running, like a pro. Today, we know that this is not how it works.

Recent models recognize that an employee's need for orientation, coaching, support, learning, and development are cyclical, and that the commencement of a new "lifecycle" is triggered by a role change. One of these models, the Employee Lifecycle© HR Model, was developed in 1997 by Dr. Jon Couture, a Senior Vice President of Human Resources with a global technology consulting and outsourcing company. In Dr. Couture's model, an employee lifecycle represents the time, from beginning to end, that an employee spends in a specific role within the company. For example, if you have been promoted twice, and moved laterally once, over a period of six years, you are considered to have enjoyed three lifecycles in a six-year career with your employer. Dr. Couture points out that every role change places the employee at the beginning of a new lifecycle.

The proof of the value of this cyclical, systematic approach to supporting people can be seen in the success of businesses who have successfully used this model as a means of promoting and supporting a highly mobile workforce of knowledge-workers in a manner that has improved employee productivity and satisfaction, while reducing employee turnover to a level below the industry standard. This model embodies one of the most important methods employed by the company in becoming the employer of choice in the IT consulting and outsourcing space. It is a huge plus in an industry fueled by knowledge-workers.

How this book will help you

This book will help you in two ways. It will provide you with step-by-step guidance in making an honest self-assessment that will assist you in deciding if the IT management role being offered is the right career move for you. For those of you who decide it is the right move, we will provide you with the basic foundation you

need to get a solid start toward becoming a peak performer. Here, then, is a brief chapter by chapter overview.

The *first chapter* of this book is designed to help you to make a well thought-out career decision. We do this by providing you with specific examples designed to help you get a better understanding of the IT management role, as well as helping you take into consideration some of the pros and cons of the specific job offer you are considering. If, after going through the exercises in chapter one, your conclusion is, "No, I don't think I want to do this," then put this book down and read no further. Go to whomever offered you the promotion, thank them for their confidence, and then graciously decline. Assuming, however, that your answer is, "Yes, this job is for me," the balance of this book will help you develop a strong foundation toward your success.

In the *second chapter*, we will help you to develop a chart that will enable you to begin orienting yourself to your new position. This chart will let you see and validate assumptions about the relationship between your company's big picture strategy and the work you and your team are charged with performing.

Chapters three through six will give you a basic grounding in some of the most useful skills you will need to learn to be effective as a new IT manager. Please note that this by no means represents everything you need to learn to be an effective IT manager. It is simply a collection of some of the most common things that you will most likely need to learn. Consider this a starting, not ending, point in your development as a new IT manager.

The *seventh chapter* will walk you through the process of doing something that is often harder than acquiring new skills and practices—letting go of old practices and tasks. This "shedding" skill is important, because unless you master it quickly, you will never be able to focus your time and energy on the things that will enable you to produce the most value in your new role as an IT manager. You will also block the creativity and productivity of your people.

The *eighth chapter* will give you a brief overview of a growing force in the IT space, which you may encounter as an IT manager—outsourcing. Today, more and more companies are outsourcing large and small components of IT. Your resistance can be harmful to your company, and it will, in time, bring your career growth to a halt. In this chapter, we will show you how to take a fresh look at actions that will help both you and your company benefit from outsourcing.

Chapter nine is a bonus offering. It presents a complete reprint of Dr. Couture's Employee Lifecycle© HR Model white paper. Those of you who are interested in working with your HR departments to implement a cyclical approach to supporting your team members will find this chapter of great value.

Finally, at the end of this book, you will find a list of resources you can use to continue to build on the foundation you will establish using this book. We strongly urge you to use these as a starting point, and to continue to build upon them for the rest of your career.

In summary, in addition to helping you decide if IT management is right for you, this book will provide you with the tools you need to quickly orient and socialize yourself into your new role (one of the most important components of success, and yet one of the most frequently skipped steps of Couture's lifecycle model).

"Learning," as Dr. Edward Deming once said, "is not compulsory." Right now, no one is driving or pushing you to read this book. The choice is yours. The information it contains, however, can make a huge difference to your surviving and even thriving in your IT career. In addition to providing you with the authors' combined forty-six years of experience drawn from the world of IT Management and Human Development, you will receive insights from some of the best experts in the field. Experts whose insights and perspectives will affect your ability to successfully execute the role of an IT manager.

We are grateful for the opportunity to lead you through this exciting journey to career success. So let's begin by making sure that IT management is the right choice for you!

1

DO YOU REALLY WANT
TO DO THIS?

Make your life a mission—not an intermission.
ARNOLD GLASGOW

While this chapter title may seem funny, our goal is not to amuse you; it is to drive home the importance of the question. We are all familiar with movies or plays built around the classic theme of "the road not taken." A few of the works elegantly portraying this subject include If by Lord Dunsany (1921), It's A Wonderful Life by Frank Capra (1946), and the more recent Sliding Doors by British actor Peter Howitt. The plot in each of these basically shows us how a future state of unhappiness or happiness is determined by a single choice that sets the direction for everything else that follows. If you examine the life of anyone—from the corporate executive to the prison inmate—you will see that, somewhere along the way, a definitive choice was made.

Most organizations today select their new IT management candidates from among their top performers. This seems like a logical and intelligent way to do things. They basically take someone who has proven his/her value in one area and give him/her more responsibility. So why does it so often fail?

One reason is that the new IT manager lacks some of the basic orientation and skills needed to be an effective manager and leader. The bulk of this book is designed to fill those gaps.

There is, however, another reason for failure; that IT management might not be the "right road" for some people. It is the purpose of this chapter to help you assess yourself, so you can decide if IT management is the right choice for you before you commit any additional time and effort to moving in that direction. Specifically, we want to make sure you choose the right road for you, before you embark on too long of a journey.

> **Joe** — Having been in IT for over two decades, I've seen my share of people in the wrong roles, and I have come to recognize the telltale signs. For example, some years ago, I joined an IT service supplier company as the head of a unit handling a number of infrastructure support processes for a major client. One thing I always do when I accept a new management assignment is to get to know all the people on the team

reporting directly or indirectly to me. That's how I met Jack (not his real name). Jack was a newly promoted supervisor who had been a top performer as a team member, but was now, according to his manager, a terrible manager.

I met with Jack, and after gaining his confidence, got him to share with me how he really felt about his management role. In a nutshell, he hated it, but feared that if he stepped down he would appear a failure to his peers and his team. It was clear to me that IT management was not the right choice for him. We devised a plan that allowed him to gracefully move back into the technical field as a contributor, without appearing to have been demoted. The end result was that Jack became a dynamic contributor again, and since then has gotten a number of promotions along the technical track to a very well paying and challenging position that he undoubtedly enjoys.

Perhaps you have already started on the journey we speak of. You've already accepted a promotion to IT management and now find yourself "not having fun." If that is the case, we recommend that you do not skip this chapter and jump straight into the next sections of this book, thinking, "Oh well, I've already made my choice, so let me just push ahead."

We believe that if IT management turns out not to be the right choice for you, you, your organization, and your current team will all benefit more from your "back-tracking" away from IT management, instead of trying to "push on" when every fiber of your being is pulling you in another direction.

To make an intelligent assessment of your personal compatibility with the role of IT manager, you first need to have a better picture of the IT manager's role. Let's take a closer look at what IT managers do.

What does an IT manager do?

So, what does an IT manager do, and how does that differ from what an IT practitioner ("doer") does? We did an exercise not too

long ago, in which we looked at a group of people who were in the IT space and determined what their specific skillsets were. Here's a brief overview of some of the specific skills for the IT practitioner (doer) in the area of repair and customization of hardware, compared with the skills of the person who manages the doers.

The doer:
- Installs and customizes software.
- Installs and fixes printers.
- Assists in the set-up of network services.
- Replaces parts in machines.
- Repairs malfunctioning software.

The manager of that person:
- Monitors and directs the daily activities of the team.
- Provides guidance and support to the team, and reconciles activity reports that show the productivity of the team.
- Continually seeks ways to improve the quality of the service.
- Continually seeks ways to reduce the cost of the service.
- Directs and navigates the team through various changes necessitated by changes in the business.
- Makes sure the right capacity and coverage of people is in place, based on the needs of the business.
- Builds the knowledge and skills of the team so that they are in alignment with the needs of the company.

Very different types of jobs, right? Your specific technical job and IT manager role or target role may be slightly different. Nevertheless, they will be just as different from each other as the ones in the above example, because all technical positions are "direct contributor" oriented, whereas management roles have a large "indirect" component.

The point here is very clear. While becoming an IT manager may seem like a natural progression from serving as an IT profes-

sional, they are actually two very different types of positions, built upon different skills and competencies.

How does the manager role differ from the doer role?

One of the most knowledgeable and well-rounded IT professionals in the business today is Priscilla Tate, the founder and Executive Director of the New York-based Technology Managers Forum. Tate tells us that "technology professionals are similar to baseball players, whereas IT managers need to be coaches." Tate tells us that she is not surprised by the high failure rate of successful IT performers dropped into management roles. "It simply is a totally different job, where the technical knowledge becomes context and the key value-generating skills are non-technical," she states.

Usually, coaches are former baseball players who know the game well. However, as coaches, their focus is on drawing out the best baseball skills from their players. To do this, they employ their personal talents for nurturing, communicating, and motivating others; the common elements in all good managers. The same holds true for the best IT managers. The former "technical components" of their jobs as technology professionals become context, just like the former baseball playing skills of the coach. The table below contains a side-by-side view of some of the generic skills and competencies employed by a technology professional, and those employed by good IT managers at a high level. A quick look at this table brings home the full impact of Tate's message in comparing team members to baseball players and managers to the coach.

TECHNOLOGY PROFESSIONAL	IT MANAGER
Skills Employed	**Skills Employed**
• Technical subject knowledge	• Understanding and maintaining team alignment with the bigger company and IT picture
• Problem-solving skills	• Communication
• Knowledgeable user of technology hardware and/or software tools (e.g. diagnostics)	• Motivating people and drawing out the best in them
	• Setting goals and direction
	• Giving feedback
	• Helping team members to further develop their skills and capabilities
	• Delegating work to the right team members

What motivates good IT managers?

Good IT managers not only use a different set of skills than their team members, they also have a different set of what we call "personal behavior drivers." For example, great managers are likely to:

• Focus on understanding their people and their innate strengths.

• They are curious about people and generally ask people questions in order to understand them and their motivations.

• Enjoy creating heroes rather than being the hero.

• See themselves more as a coach than as a teacher. The subtle difference is that teachers input content into people, whereas coaches bring out the best that already resides within their charges. (Although managers may still do some teaching.)

• Be sensitive to what each person in their charge needs in order to do their best (e.g., a moment of distraction, or to be given

room to quietly focus their thoughts).

- Be cultivators who carefully water and prune their "garden of people," with deep respect for the land.
- Have a highly developed sense of empathy that gives them insight into other people.

In short, a good IT manager is generally someone who is capable, willing, and enjoys being "the wind beneath someone else's wings."

Profiling the IT Manager Role

Below is a generic profile of the talents, gifts, and personal propensities of a good IT manager, based on the information we've discussed so far in this chapter.

Generic IT Manager Role Drivers—Primary Talents/Gifts/Mindset Profile.

What does an IT manager need to be able to do easily?

Communicate with senior managers, peers, and their team members.

Bring out the best performance from individuals and teams.

Guide, support, and direct team members as needed, without over-managing them.

What do good IT managers generally love to do that makes them feel rewarded by this role?

Coach and support the performance of others.

Develop the skills, talents, and capabilities of other people.

Plan and orchestrate results that bring success to their teams.

What tend to be some of the goals of people who are successful in this role?

To be "star-makers" (as opposed to "stars").

To be great communicators.

To display and inspire confidence.

What do good IT managers generally do naturally, almost automatically?

Get to know their people.

Learn and stay in touch with the big picture in their company and field.

Break down and explain things.

Do you fit the basic IT manager profile?

The following are profiles of three different people considering a move into IT management. As you read through these, look for similarities between yourself and the people profiled.

Mary is a top-notch IT technician and a star performer on her team. She is happy in her work and enjoys the many accolades she receives for her accomplishments. Mary enjoys the variety of projects she has the opportunity to work on within the company. She's always working on one or two new ideas to help drive improvement and has a few "pet" projects. If you asked her what she likes most about her job, she would say, without the slightest hesitation, that she likes "the limelight," solving problems, and seeing immediate results.

Fred is a hardware whiz. He is willing to help his co-workers, but he gets a little restless and annoyed when he has to share his knowledge of hardware and technology with people who don't quickly "get it." He does, however, enjoy talking about the latest gadgets and technology with peers who match his expertise. On weekends, Fred likes to "tinker" with his computer at home, adding components and software tools. Fred is the kind of person who likes things done quickly and feels that few people can do his job as quickly or as well as he can. If you asked Fred what he likes most about his job, he would say tinkering, solving problems, learning more about new technology, and getting work done with his own hands.

Elizabeth is one of the top IT software developers in her company. While Elizabeth is a star individual performer, she's also the first one to step forward when someone else needs help in learning how to solve a problem. Although she's very talented in her own right, she has always enjoyed nurturing others and helping them discover how to tap into their own pool of talents to solve problems. She's also a great organizer and volunteers to take the lead for special projects whenever the opportunity arises. "Liz (Elizabeth) just makes me feel secure, like I really know what I'm doing and my contributions count," explains Jim, a young developer Elizabeth has "unofficially" taken under her wing. Elizabeth simply has a knack for bringing out the best in the people she works with, and she enjoys doing it. While Elizabeth has enjoyed being a software developer, she's become aware over the last two years that her personal focus has evolved into more enjoyment of teaching, coaching, and organizing others to success. If you asked her what she currently enjoys most about her job, she would point to the projects where she had an opportunity to orchestrate a team of people to success. She is especially proud of the progress made by Jim.

Do you see yourself in any of these people? If you are more of an Elizabeth, the chances are that you are pretty well suited for the move into IT management. Elizabeth exhibited some of the key traits and values of a good manager. She is a nurturer, a star maker. This does not mean that Mary or Fred might not become good managers. But if, like Mary and Fred, you enjoy being the technical expert, the "go-to-person," and "the star," chances are you won't want to give up the enjoyment you get out of your current role in order to make someone else the expert, the go-to-person, and the star.

One more final question: Are you willing to pay the price?

So, let's say that on reading the examples above, you conclude that your personality and career focus are well-suited to IT man-

agement. Good, now we need to make sure that you are willing and able to accept any additional challenges or cons that this new position may bring. For example, in your company as an IT manager, you may be required to travel more and to be out of town for longer periods of time. Or perhaps you will be asked to relocate or attend weekend meetings every month. You may not consider some of the things listed here as "cons." Or perhaps they are "mild cons." The important thing that we want you to do is to think about all of the items that you might consider cons, and factor these in along with the pros when making your decision. This is part of what we call being willing to "price your pay" for accepting this role.

In making this decision, we think you will find useful a simple pro and con exercise used by Benjamin Franklin when he was faced with an important choice. Here is how you can set up your own pro and con decision-making table:

On a piece of paper, draw a table with two columns.

- Label the first column *Pros.*
- Label the second column *Cons.*
- List all of the benefits of accepting the IT management position in your company in the *Pros* column.
- List all of the negative cost factors of accepting the IT management position in your company in the *Cons* column.

Using the Elizabeth profile above, let's see how this works. Suppose that Elizabeth, after determining that she would enjoy the role of IT manager, collected information on the specifics of this new job and the results were as follows:

- Attend 7 a.m. meetings with my boss regularly.
- Stop working on the "mCommerce Genesis Project."
- Meet with vendors/suppliers each week to go over work performance.
- Work with more people and develop teams.

- Opportunities to coach and help people grow.
- Significant increase in salary.
- Fast-track my career.
- Achievement and recognition from higher-ups in the company.
- Relocate five hundred miles away from my current location.
- Travel an additional sixty days per year.

Based on her current life situation and other factors, Elizabeth views some of these items as pros and others as cons. (You may consider them differently). Here is her Pro/Con Decision-Making Table.

PRO'S	CON'S
• Meet with vendors/suppliers each week to go over work performance.	• Attend 7 A.M. meetings with my boss regularly.
• Work with more people and develop teams.	• Stop working on the "mCommerce Genesis Project."
• Opportunities to coach and help people grow.	• Relocate five hundred miles away from my current location.
• Significant increase in salary.	• Travel an additional sixty days per year.
• Fast-track my career.	
• Achievement and recognition from higher-ups in the company.	

Elizabeth's Pro/Con Decision-Making Table

Looking at the cons, Elizabeth realizes that they will not have a major negative impact on her. She usually gets to the office at 8 a.m., but actually works at home from 6:20 a.m. to 7:20 a.m. She will need to get to the office earlier on the meeting days, but her wake-up time will be the same. She likes the "Genesis Project," but she is more thrilled by the prospect of heading up a team, so she's okay with giving that up. The relocation is a bit tougher and so is the travel, but given the benefits offered by the pro column items, she decides to accept the position.

The point here is that there are clearly some big and little cons, but after consciously weighing them, an uncluttered and positive decision resulted. This is much better than accepting the job, letting these things "float up" later, and feeling miserable. What is most important is not the complete absence of cons, but rather your decision after honestly looking at all the pros and cons.

Always make sure you stay happy the "Warren Buffett way"

When speaking to a group of students at the University of Nebraska, Warren Buffett, one of the richest men in the world, said, to the surprise of his audience, "I am really no different from any of you. If there is any difference between you and me, it may simply be that I get up every day and have a chance to do what I love to do—every day. If you want to learn anything from me, this is the best advice I can give you."

ACTION ITEMS:

1: Think and determine if you fit the general profile of someone who is a "star-maker, communicator, nurturer, and coach." (If you like sports, ask yourself who you admire and model yourself against most, a coach like John Wooden or one of the players.)

2: List the specific things that will change if you accept this IT management position, and then compare the pros and cons using the Benjamin Franklin Pro/Con Decision-Making Table.

3: Decide to accept or decline.

If your decision is to not accept this position because the work does not appeal to you, then stop reading right here and consider how much time, energy, and pain you saved yourself and others by reading just these few pages.

If your decision is to not accept this position because, while the work does appeal to you, the cons for this specific job outweigh the pros, then either read to prepare for the next opportunity or tuck this book away until the time comes when you need it.

If your decision is to accept the position because the work appeals to you and the pros outweigh the cons, then please proceed *immediately* to the next page where you can order the full edition of Manage I.T. and jumpstart your new career path.

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His previous published works include co-authoring a popular Internet marketing audiocassette program entitled *Internet Gold: The Basics* published by Pharaoh Audiobooks in 1995.

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For more than 25 years, Jim Donovan has worked with individuals, companies, and organizations to implement strategies for personal and professional growth.

Jim is a frequent speaker to businesses, trade groups, and associations, and his seminars have benefited hundreds of audiences nationwide. His seminars inspire individuals to take charge of their lives, provide them with transformational ideas and strategies for their success, and inspire them to achieve peak performance.

Jims coaching programs employ a proven step-by-step process that synthesizes some of the most effective information, tools and methods from the fields of marketing, sales, quantum physics and universal spirituality. They are uniquely designed to identify the strengths within an organization and build upon them. His focus is on helping clients produce significant, explosive results and quantum leaps well beyond what is expected.

As an internationally recognized author, his books have been translated into four languages and distributed worldwide, including his bestseller, *Handbook To AHappier Life*, a simple guide to creating the life you've always wanted, *This Is Your Life, Not A Dress Rehearsal*, proven principles for creating the life of your dreams, and *Reclaim Your Life*, how to regain your happiness through challenging times.

Since 1991, he has published an internationally syndicated newsletter for personal and professional development, aimed at business executives, entrepreneurs, and individuals. Jim is a popular guest on radio talk shows and TV stations, and a regular member of the "brain trust" for The Small Business Advocate syndicated radio show. His articles regularly appear in newspapers and magazines as well as on the Internet.