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THE ULTIMATE GUIDE TO CREATING A TECHNOLOGY ROADMAP

A MINDSIGHT GUIDE

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We work in interesting times. If you were to look back at the business world just ten years ago, everything would seem so primitive. Computers were slower, smartphones were just hitting the market, and social media was still in its infancy. Technology was certainly a component of business strategy, but today, it is a key determining factor of success.

At the enterprise level of business, the demand for new technical solutions is undeniable. If you don't have the latest innovation or solution, undoubtedly one of your competitors does, and the business will suffer for it. At a smaller scale, small-to-medium businesses must still be strategic about what technology they buy, when they buy it, and how it aligns with the goals of the business. In each case, there is one universal truth.

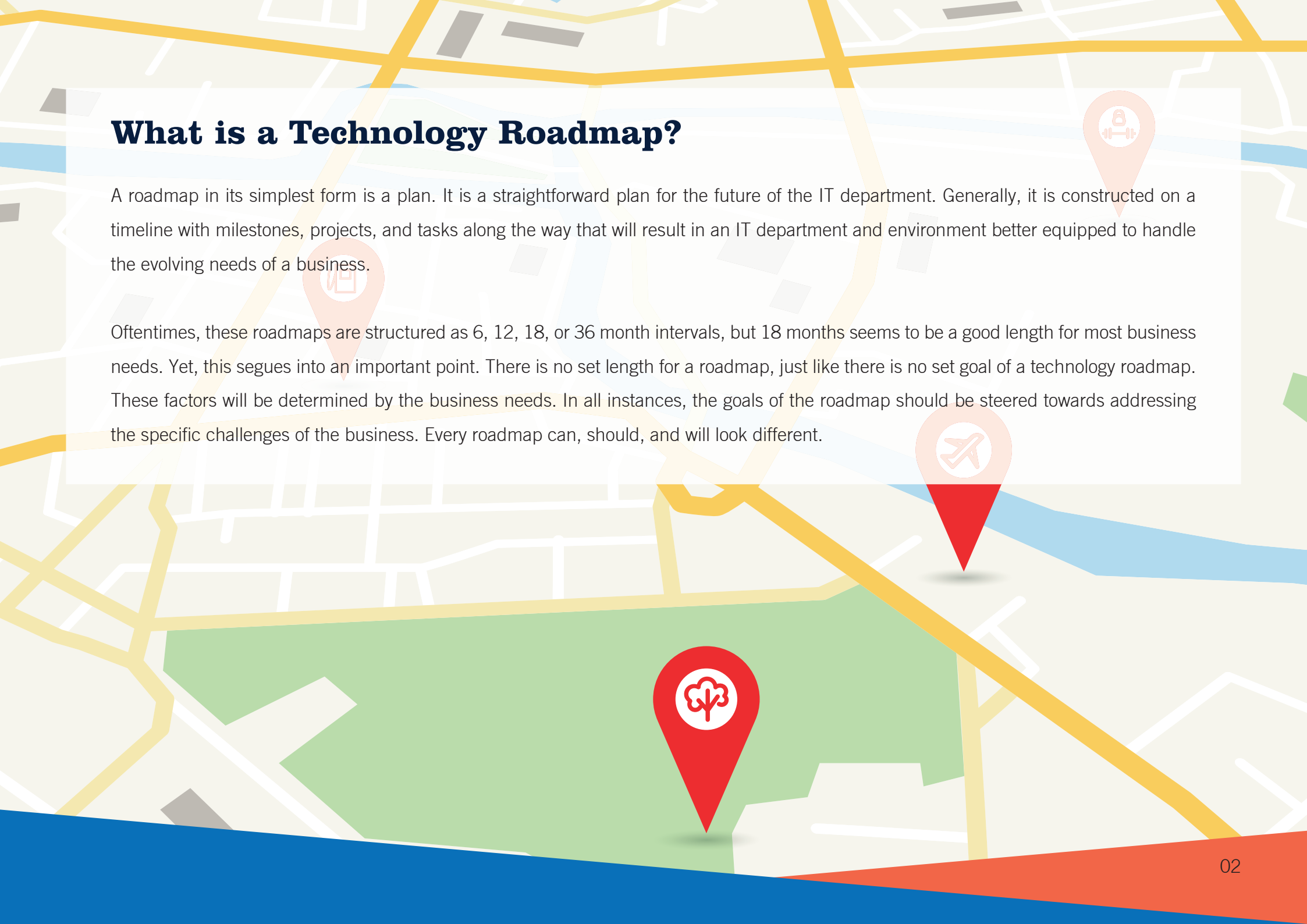
Businesses today need a technology strategy. They need to have a plan for how their IT environment can expand or direct their resources to best benefit the organization as a whole. For that, you need a technology roadmap.

In this guide, we're going to take a close look at the issues and challenges of the technology roadmap. We hope to articulate its importance and equip you with the tools and knowledge you need to begin your own technology roadmap.

What is a Technology Roadmap?

A roadmap in its simplest form is a plan. It is a straightforward plan for the future of the IT department. Generally, it is constructed on a timeline with milestones, projects, and tasks along the way that will result in an IT department and environment better equipped to handle the evolving needs of a business.

Oftentimes, these roadmaps are structured as 6, 12, 18, or 36 month intervals, but 18 months seems to be a good length for most business needs. Yet, this segues into an important point. There is no set length for a roadmap, just like there is no set goal of a technology roadmap. These factors will be determined by the business needs. In all instances, the goals of the roadmap should be steered towards addressing the specific challenges of the business. Every roadmap can, should, and will look different.



A Continuing Dialogue

The business leaders know where the business is headed. They know what challenges they are going to face, and they know what advantages the competition has over them. In short, they know what they want. They just lack the technical awareness to know how this is achieved. The opposite is true for most IT departments. IT understands what challenges the environment faces but not necessarily the business. It is IT's role to translate the business needs into workable solutions that give the business the greatest chance for success.

By establishing these lines of communication, you can align the agendas of the IT side and business side of the company. The business needs to provide their workforce with the knowledge and tools to make sure their employees can do their jobs. Aligning business and IT through a roadmap ensures that time is used effectively, and the achievements of one area of the company set the stage for future success elsewhere in the company.

Where You Are and Where You're Going

Every roadmap includes a thorough analysis of where the IT environment currently is along with a projection of where the company would like their IT environment to be at the end of roadmap. The more thorough these analyses are, the more organized the roadmap will inevitably become.

The current state analysis should cover the following:

- Performance and age of IT assets
- The business expectations of IT
- System dependencies
- Application dependencies
- Current IT costs and return on those expenses
- Operational procedures

The goal of this exercise is to draw stark contrast between where you are and where you hope to be. From there, the business needs to identify where the environment is lacking and chart steps on how to move from point A to point B.

Why You Should Draft a Technology Roadmap

The reasons for developing an 18 month roadmap are not self-evident. Certainly technology is important, but why must the business meticulously plan out their strategy for over a year into the future, especially if the environment is working just fine as it is? The truth is that there are many reasons to draft your roadmap, and some of these reasons will be more or less relevant to different businesses depending on their industry.

Staying Competitive:

There are industries that are so intertwined with their technology that lagging behind could cost the business their position in the market. The story of Uber is an excellent example of this dynamic. Uber disrupted an enormous taxi industry in a remarkably short period, because they offered an experience to their customer that was considered without doubt superior to their competitors. The experience was driven almost exclusively by their mobile app which taxi companies simply didn't have.

Predictability of IT Expense:

IT expenses can be notoriously difficult to predict. Should a piece of data center hardware fail, it could cost thousands of dollars of capital to replace. A roadmap provides at least some semblance of IT expenditures for the duration of the roadmap. Yes, equipment can still fail, and the IT budget may still need cushion for such an event. Yet, the business will still be able to confidently point to other costs along the way and plan accordingly.

Answers the Cloud Question:

The cloud is not something any company should rush into. It takes a lot of time to migrate, and if not done correctly, your migrated applications may not even work. To save time and money, a detailed roadmap would be best. With the end goal being, “an ideal cloud deployment for our business needs,” you can chart the myriad of different steps that need to be taken by the business to achieve that elusive goal.

Ensuring the Business Meets Regulatory and Compliance Needs:

A roadmap provides the opportunity to prepare for any compliancy or regulatory changes that must be made in the organization.

Attract Better IT Talent:

If you know what you want and you know what you need to do to achieve it, you'll understand what additional personnel will be required to complete the roadmap. This gives you a clear advantage in the job market. You can attempt to find an IT professional with the skills most suited for your current needs. Furthermore, a clear vision for what you expect of a new hire will make your business more attractive.

Using Employee Time Wisely:

It is easy in IT to get lost in the weeds of the day-to-day management of an IT environment. Administrators can lose hours in a day to putting out fires and addressing immediate concerns. The roadmap puts the long-term goals of the department front and center in the minds of the team. With specific milestones and deadlines, the team can budget their time appropriately to ensure their goals are met.

Improve the Relationship Between IT and the Business:

IT can be seen in the business as a barrier, when it should be the enabler of success. Instead of IT telling other business units no when they request a new application or technology, the roadmap will ensure the IT department addresses the needs of the business in the most stable, secure, and cost effective method possible. This will lead to more communication between departments and hopefully an understanding of the capabilities and limitations of the IT department. Other business units no longer need to make these requests out of the blue. They can be addressed during roadmap planning sessions and understand that their needs will be met on a transparent timeline.

How to Write Your Technology Roadmap

With an understanding of what a roadmap is and why a business should devote time to developing one, the next phase of this guide will describe how to best draft your roadmap. We'll cover best practices, pit falls, and proven strategies to ensure that this process goes as smoothly as possible. The final result will be a realistic, strategic, roadmap that actually yields the change in your IT department that the business needs.

Setting Goals: Growing or Shrinking Businesses

Technology roadmaps should have a goal. It doesn't need to be a grand overhaul of the department or a transformation of the data center, but there should be some achievement at the end that you can put your finger on.

However, the goal of the roadmap is going to be influenced by the trajectory of the business. Is the business growing or shrinking? Understanding where your business is today is essential to planning for where your business will be in the future. From there, you can work to find an achievable goal for the roadmap.

Shrinking Businesses:

If profits are shrinking and this business decline is expected to continue throughout the length of your roadmap, you have a very specific goal. There is unlikely to be any money in the budget for new purchases, equipment, or applications. Instead, the role of the roadmap will be preservation. Your job is to maintain the essential applications and hardware, keep all systems online, and preserve IT capabilities as much as possible. Meanwhile, there could be an element of downsizing that occurs during the roadmap or a streamlining of the department to align with the business's needs.

Growing Business:

If the business is growing, you have many more opportunities before you, so your goal is going to be largely determined by what applications, hardware, or capabilities the business needs to stay competitive in the industry or address unique challenges within the business. That goal could be hiring and training several new IT employees, migrating your applications into the cloud, or any other long-term IT pursuit.

Decisions Based on Data:

At no point during the planning or execution process should the business leaders or IT departments be “guessing” about elements in the roadmap. Your decisions must be based on real data or insights gained from said data. This includes but is not limited to:

- Historical gross and net annual revenue
- Financial projections for the duration of the roadmap
- System utilization stats
- Current storage capacity, consumption, and a projection for when the business will exceed that capacity
- Network speeds and performance

Most of this information will be readily accessible to an IT director, but other data points may require discussions with business executives. A technology roadmap requires an ongoing conversation between the business leaders and the IT department to ensure that the goals of the roadmap align with the goals of the business.

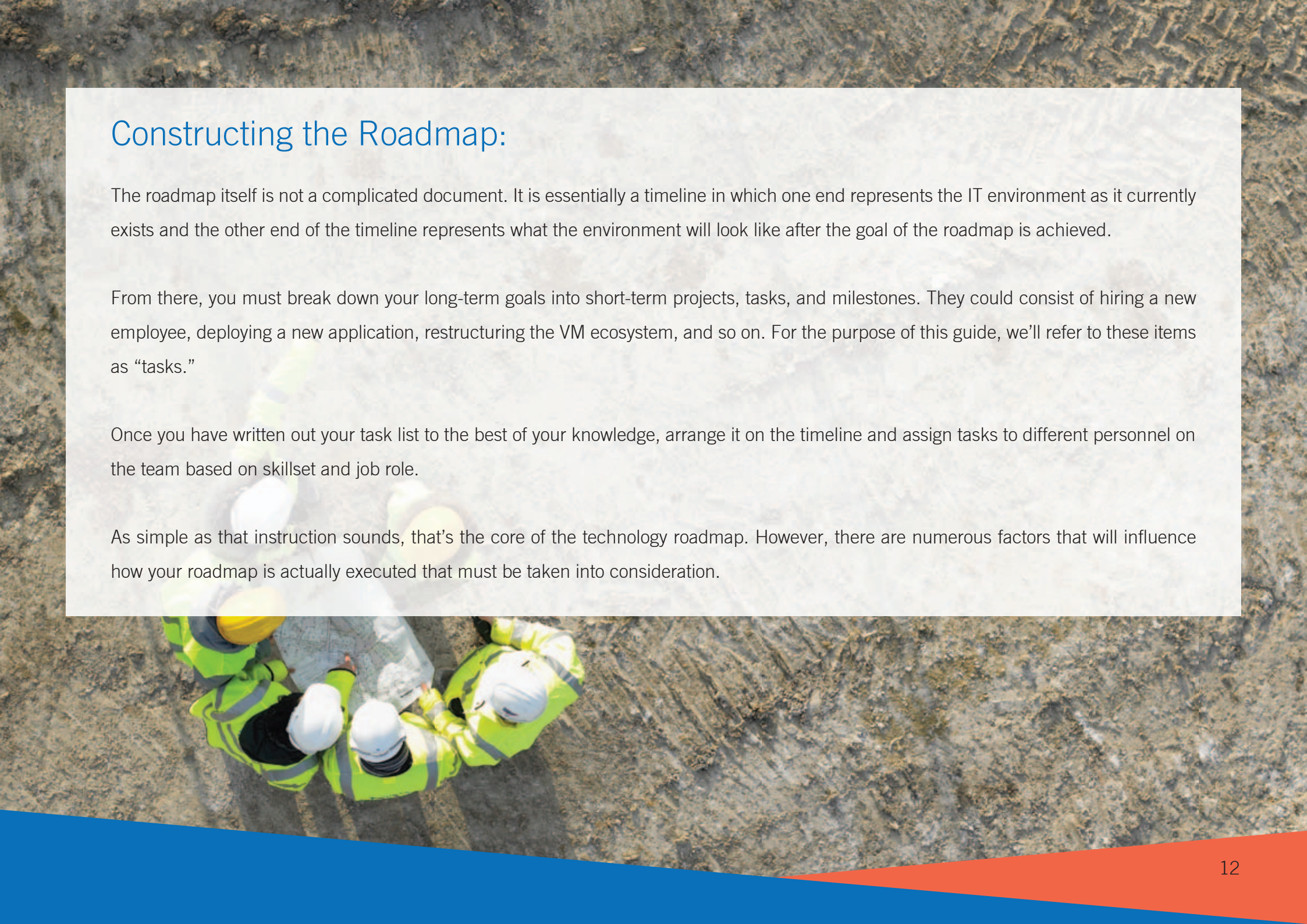
Constructing the Roadmap:

The roadmap itself is not a complicated document. It is essentially a timeline in which one end represents the IT environment as it currently exists and the other end of the timeline represents what the environment will look like after the goal of the roadmap is achieved.

From there, you must break down your long-term goals into short-term projects, tasks, and milestones. They could consist of hiring a new employee, deploying a new application, restructuring the VM ecosystem, and so on. For the purpose of this guide, we'll refer to these items as "tasks."

Once you have written out your task list to the best of your knowledge, arrange it on the timeline and assign tasks to different personnel on the team based on skillset and job role.

As simple as that instruction sounds, that's the core of the technology roadmap. However, there are numerous factors that will influence how your roadmap is actually executed that must be taken into consideration.



Factors Affecting Your Roadmap and Common Challenges

Business Acquisitions or Sales:

If the business is positioning itself to acquire another business or sell itself, this will unsurprisingly impact your technology roadmap. Even if you know that the purchase or sale will take place, it will still be difficult to account for this radical change in the business. If you do not know who the buyer or acquired company will be, you cannot know what kind of IT environment you will soon be inheriting. Keep lines of communication open with the business leaders and make sure these events are on your radar as soon as possible.

Researching Product Alternatives:

If your technology roadmap includes deploying a new application, it is important to do your research. The technology industry is filled with startups, major developers, and middling companies that may all offer products with overlapping functionality. Finding the right application for your business requires due diligence.

Policy and Procedure Reviews:

Are your policies and procedures scalable and ready to meet the demands of the growing business? Do you have a disaster recovery solution? Will your clients be demanding a disaster recovery solution in the future? Refining the structure of the IT department and the disaster recovery plan may be goals of the technology roadmap in-and-of-themselves, or if not, there are sure to factor into any long-term plan.

Scalability:

Related to the policy and procedure review, a technology roadmap needs to factor into the scalability of the applications in the environment. Will the goal of the roadmap stretch existing applications beyond their reasonable scalability? The goal of the roadmap itself must also be scalable. Otherwise, you may be finding yourself starting all over again in a couple years.

Outside Consultants and 3rd Parties:

Consultants can play an integral role in your technology roadmap. Whether they help with a current-state analysis of the environment or take on tasks along the way, outside help from experienced consultants can make the entire process go more smoothly. When searching for a technology consultant to draft a roadmap, consider the following factors:

- **Experience and Certifications:** The consultant must have advanced certifications and an engineering team with the experience to complete necessary tasks.

- **Technology Partners:** You want to look for consultants with a diverse set of partner relationships in the industry. A narrow focus in the industry narrows the available solutions.

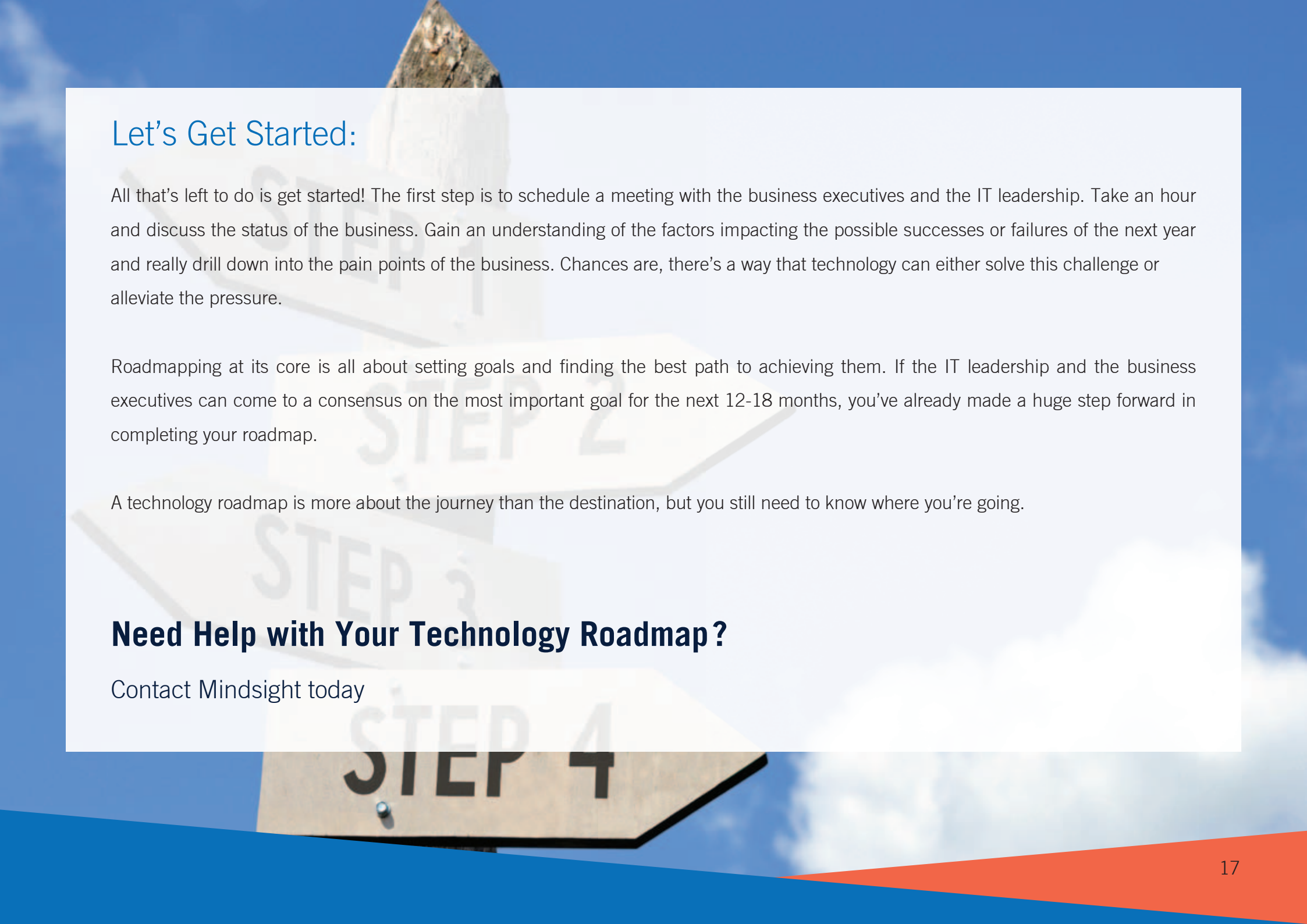
- **Transparency and Good Communication:** The consultant must have a policy of transparency in their consultative relationships. If information cannot be shared openly and the consultant does not take the time to understand the needs of the business, the final road map can diverge from what is actually needed.

Summary

Success in the technology world requires an open mind and a good plan, and that is exactly what a roadmap provides. There is almost certainly the perfect application, equipment, or cloud deployment out there for your business, but the greater the rush, the greater the risk. A detailed and thoughtful roadmap will yield the best results with the least disruption every time.

Once your roadmap is in hand, the job is not done. It never truly will be. Roadmaps require updating, realigning, or restructuring every six months or a year to ensure that the theoretical plan still matches the concrete reality on the ground. Sometimes projects need to be pushed, sometimes a planned solution may not actually solve anything. The key is to always have a plan, even if that plan needs adjusting every once in a while.

Your technology roadmap will guide your business through a chaotic technology industry. With a hundred tech developers releasing a hundred overlapping solutions, your roadmap will keep your business focused on its goal and constantly aware of the changing nature of the industry.



Let's Get Started:

All that's left to do is get started! The first step is to schedule a meeting with the business executives and the IT leadership. Take an hour and discuss the status of the business. Gain an understanding of the factors impacting the possible successes or failures of the next year and really drill down into the pain points of the business. Chances are, there's a way that technology can either solve this challenge or alleviate the pressure.

Roadmapping at its core is all about setting goals and finding the best path to achieving them. If the IT leadership and the business executives can come to a consensus on the most important goal for the next 12-18 months, you've already made a huge step forward in completing your roadmap.

A technology roadmap is more about the journey than the destination, but you still need to know where you're going.

Need Help with Your Technology Roadmap?

Contact Mindsight today

ABOUT MINDSIGHT

Mindsight is a business technology consulting firm that, through listening to our clients first and foremost, provides thoughtfully crafted and thoroughly-vetted perspectives to our clients' toughest business and technology challenges. Mindsight believes in being transparent and candid, which means more productive interactions and less pretense. The company provides the best thinking to achieve the best result rather than simply providing another "canned" solution. When you need a different point of view, you can count on Mindsight.

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