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| **Strategic Objective** | **Measurement** | **Strategy/Initiative** | **Due Date** | **Assigned To** |
| 1. **LEADERSHIP:**  Provide strategic-level IT leadership to the firm | * Revenue per FTE * IT Cost metrics * Plan reviews conducted * Annual performance reviews and evaluations * Annual IT Plan and Budget | * 1. Set Executive Committee expectations for Firm CIO   2. Develop growth plan for ?   3. Conduct periodic plan reviews:      + Personal Development Plan      + IT Strategic Plan      + Firm Strategic Plan   4. Manage to annual IT Plan and Budget      + Prepare plan and budget      + Approval      + Ongoing management | 03/31/2013  04/30/2013  Quarterly  03/31/2013  03/31/2013  Quarterly |  |
| 1. **TEAM DEVELOPMENT:** Develop a High Performance IT Team | * Plans prepared and reviewed * Participation in peer networking events * EC interactions | * 1. Continue Professional Development Plans (PDP) for ALL IT staff and leaders   2. Continue 90 Day Game Plan process for IT Staff   3. Engage in peer networking and interaction for professional development   4. Develop and promote a Learning and Training culture in IT   5. Conduct ongoing reviews of organization and internal processes | Quarterly  Quarterly  05/01/2013  Ongoing  Quarterly |  |
| 1. **CLIENT MANAGEMENT:** Support client service  * Internal Clients * External Clients | * Surveys conducted and reviewed * Client service training participation * Process reviews conducted | * 1. Support Internal clients      + Gain and maintain respect and confidence        - Use satisfaction surveys and feedback        - Enroll in formal client service training for IT staff   2. Support External clients      + Assist in process improvement reviews      + Provide engagement support | Annually  12/31/2013  Ongoing  Ongoing |  |
| 1. **BUSINESS DEVELOPMENT:** Support the culture of firm growth  * Organic growth * Acquisition growth | * Decision support tools prepared and used | * 1. Support organic growth      + Ensure scalability and flexibility of system decision      + Provide support for business development (CRM, etc.)   2. Support Mergers and Acquisitions (M&A)      + Ensure early involvement of IT in merger planning      + Develop merger candidate evaluation tools and procedures      + Ensure post-merger integration | Ongoing  Ongoing  06/30/2013 |  |
| 1. **PERSONAL EFFECTIVENESS:** Support the High Performance Firm | * Acceptable level of system availability * No data loss or compromise * Business continuation plan and tests * Full license compliance | * 1. Ensure highest levels of system availability   2. Ensure system security to protect confidential information   3. Plan and test for Business Continuation   4. Ensure software licensing compliance   5. Conduct continuous research and evaluation of alternatives      + Architecture      + Vendors      + Mobility      + Process | Ongoing  Ongoing  Semi-annually  Annually  Ongoing |  |