

# *Pattern-based Strategy*

**Strategically Aligning Information Management  
for Mission Success**

3/17/2011

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# Report Documentation Page

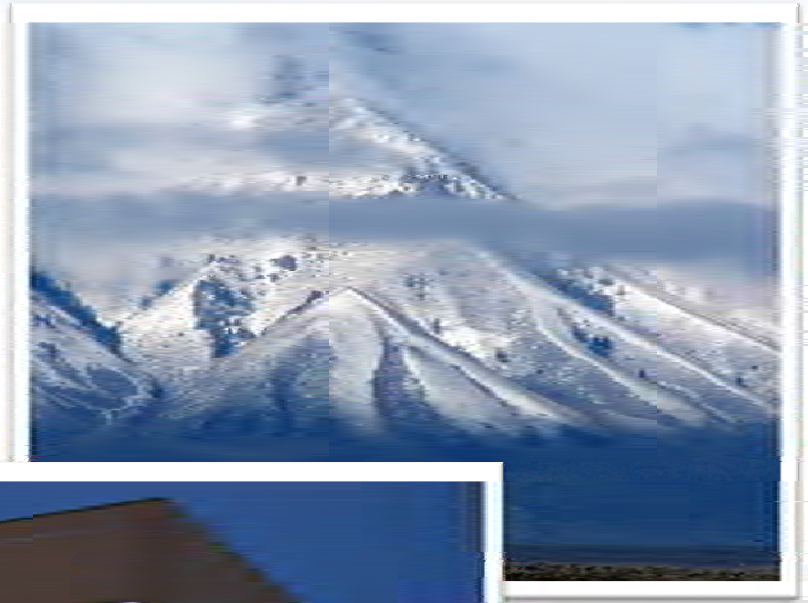
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# About Me

- Idaho National Laboratory
  - Nuclear Programs
  - National & Homeland Security
  - Energy & Environment
- Information Management
  - Manager of IM Strategic Planning
  - Enterprise Architect



# Idaho National Laboratory



## Mission


- Ensure the nation's energy security with safe, competitive, and sustainable energy systems and unique national and homeland security capabilities.

## Vision

- By 2015, INL will be the pre-eminent nuclear energy laboratory with synergistic, world-class, multi-program capabilities and partnerships.







Operational effectiveness and **STRATEGY** are both essential to **SUPERIOR PERFORMANCE**...but they work in very different ways.

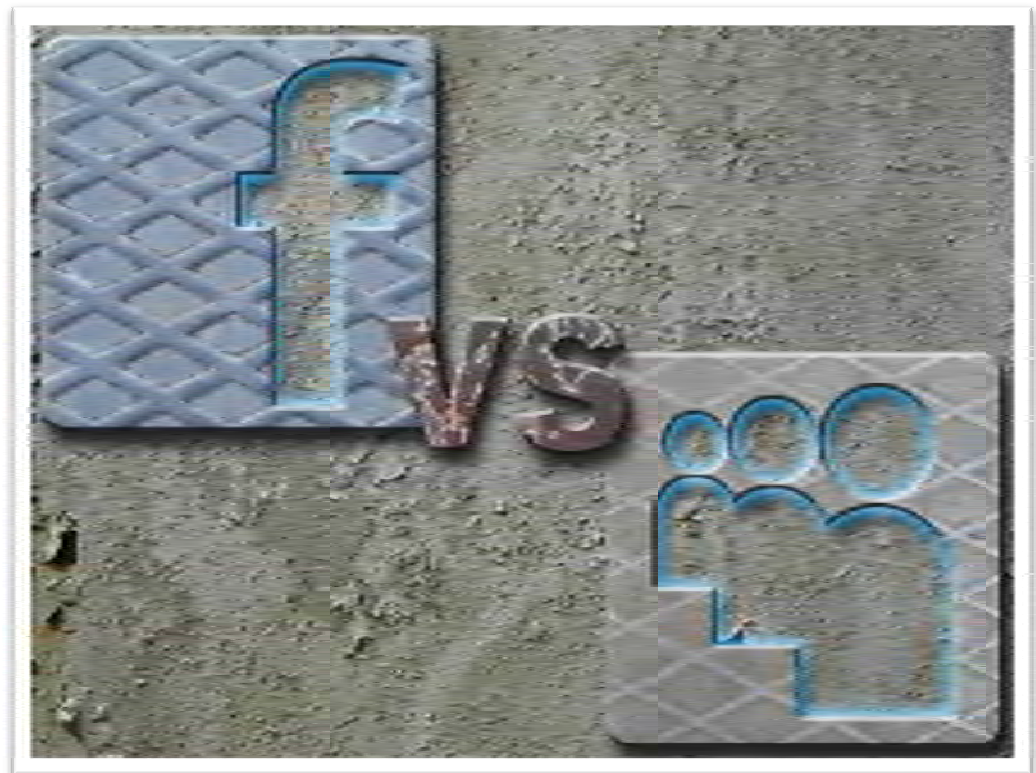
A company can outperform rivals only if it can establish a **DIFFERENCE** it can **PRESERVE**.

-Michael Porter, HBR, 1996

# Examples

amazon.com.

**BARNES & NOBLE**





# *Pattern-based Strategy*

Patterns + Context = Strategy

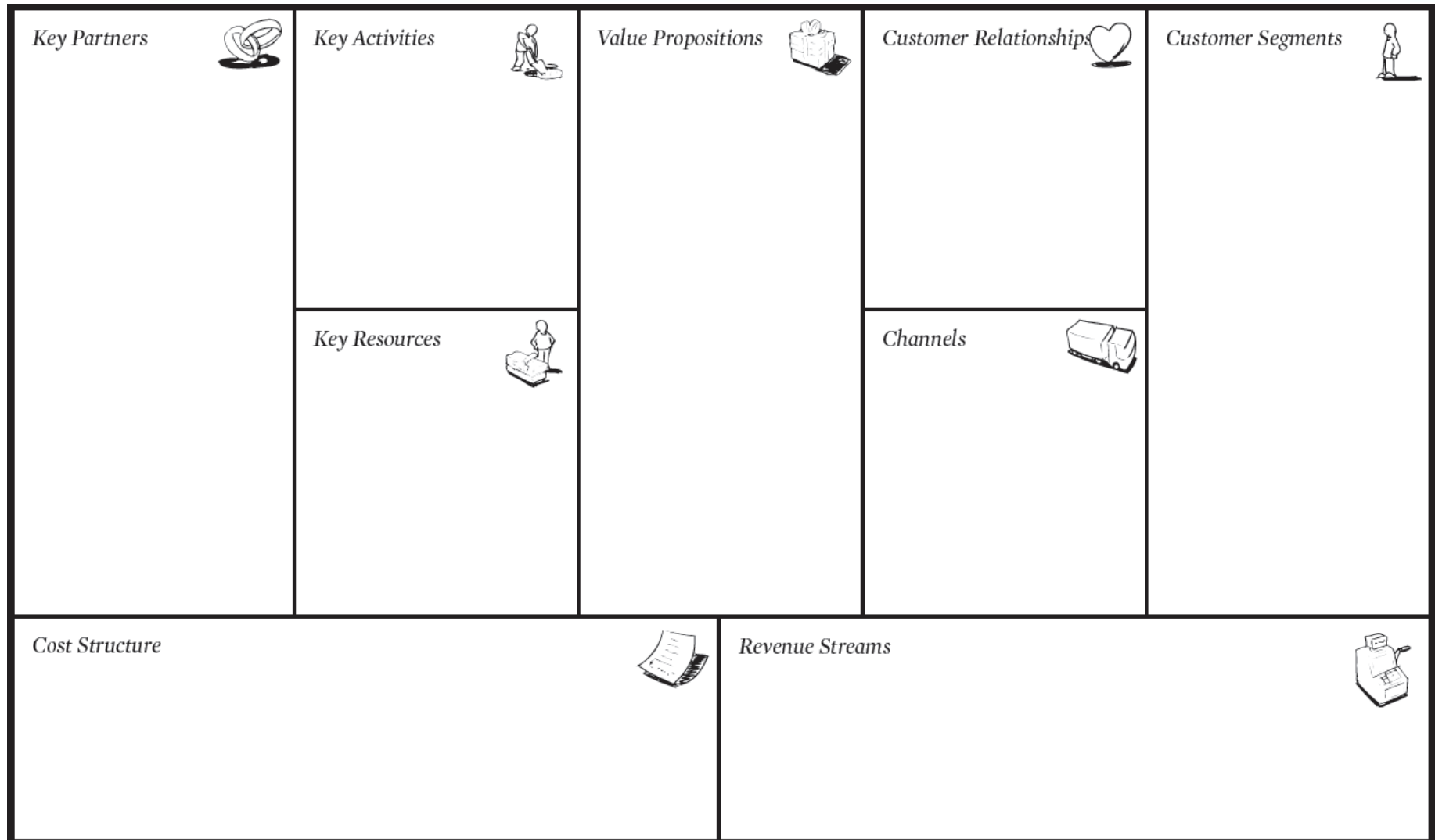


# *Patterns*

Groups and structures in the data that are, in some way or another, **similar**.



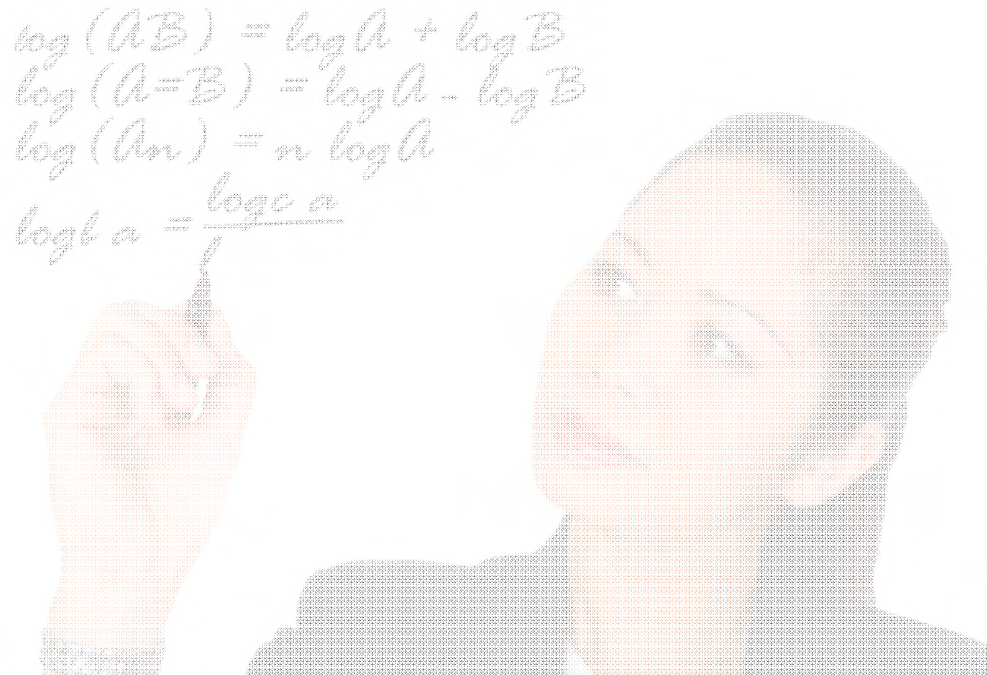
# Business Context



# What is Strategic?

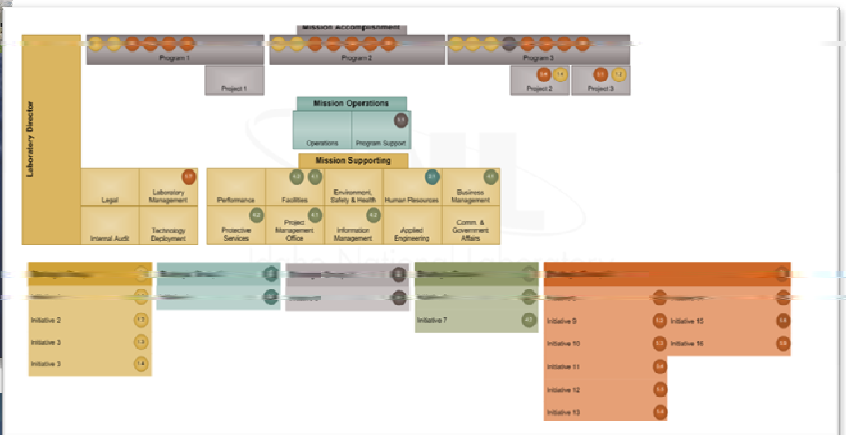
- Things are strategic because they support the company's sources of **competitive advantage**.
  - Things that are valued and attractive to customers
  - Things that are unique in the marketplace
  - Things that are not easily copied
  - Things that are not easily substituted by other things

**- Mark P. McDonald, Gartner**

A woman with dark hair, wearing a dark top, is shown from the chest up. She is holding a white marker in her right hand and is looking towards the left. She appears to be writing on a whiteboard. The whiteboard contains four logarithmic formulas written in a cursive, handwritten style.
$$\begin{aligned}\log(A \cdot B) &= \log A + \log B \\ \log(A \div B) &= \log A - \log B \\ \log(A^n) &= n \log A \\ \log_b a &= \frac{\log_c a}{\log_c b}\end{aligned}$$

# “Know thy Customer”

- What is the strategy of the organization?
- Who is executing the strategy and what are their needs?

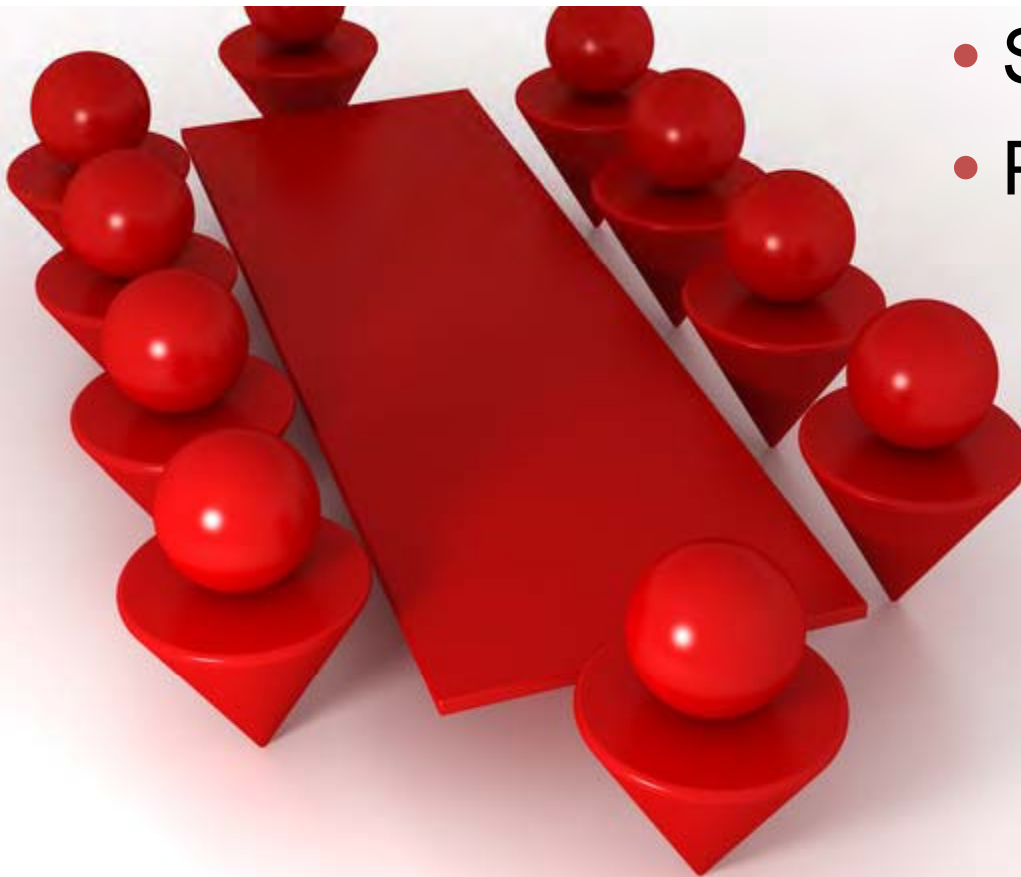


- Company Strategy
- News Stories (iNotes)
- Projects
- Department Strategies
- Organizational Structure
- Business Architecture



# Customer Engagement

- Interviews
- Focus Groups
- Service Issues
- Past Complaints



## ***Capture / Record***

- Challenges – What keeps them up at night?
- Successes – What is occurring in their organizations that is noteworthy?
- *Names*
- *Dates*
- *Actual Statements from Participants*
- *Customer Terminology*



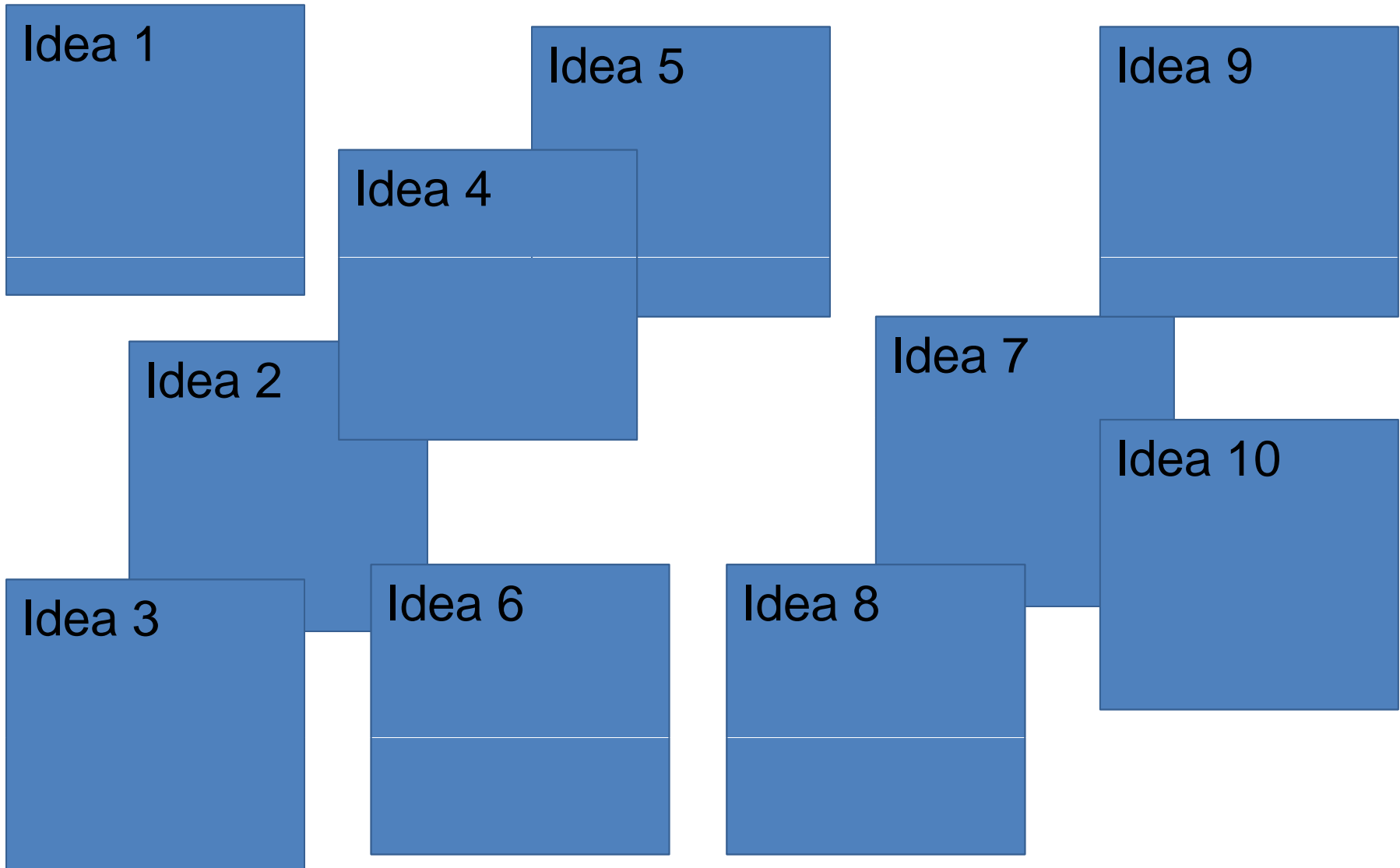
# *Pattern Identification*

## **Affinity Diagram / Sticky Note Method**

- Sort Ideas into natural themes by asking:
  - What ideas are similar?
  - Is this idea connected to any of the others?
- Organization
  - Headers
  - Color



# Sticky Note Method



# Sticky Note Method

Category 1

Idea 1

Idea 2

Idea 9

Category 2

Idea 5

Idea 10

Idea 4

Idea 7

Category 3

Idea 6

Idea 3

Idea 8

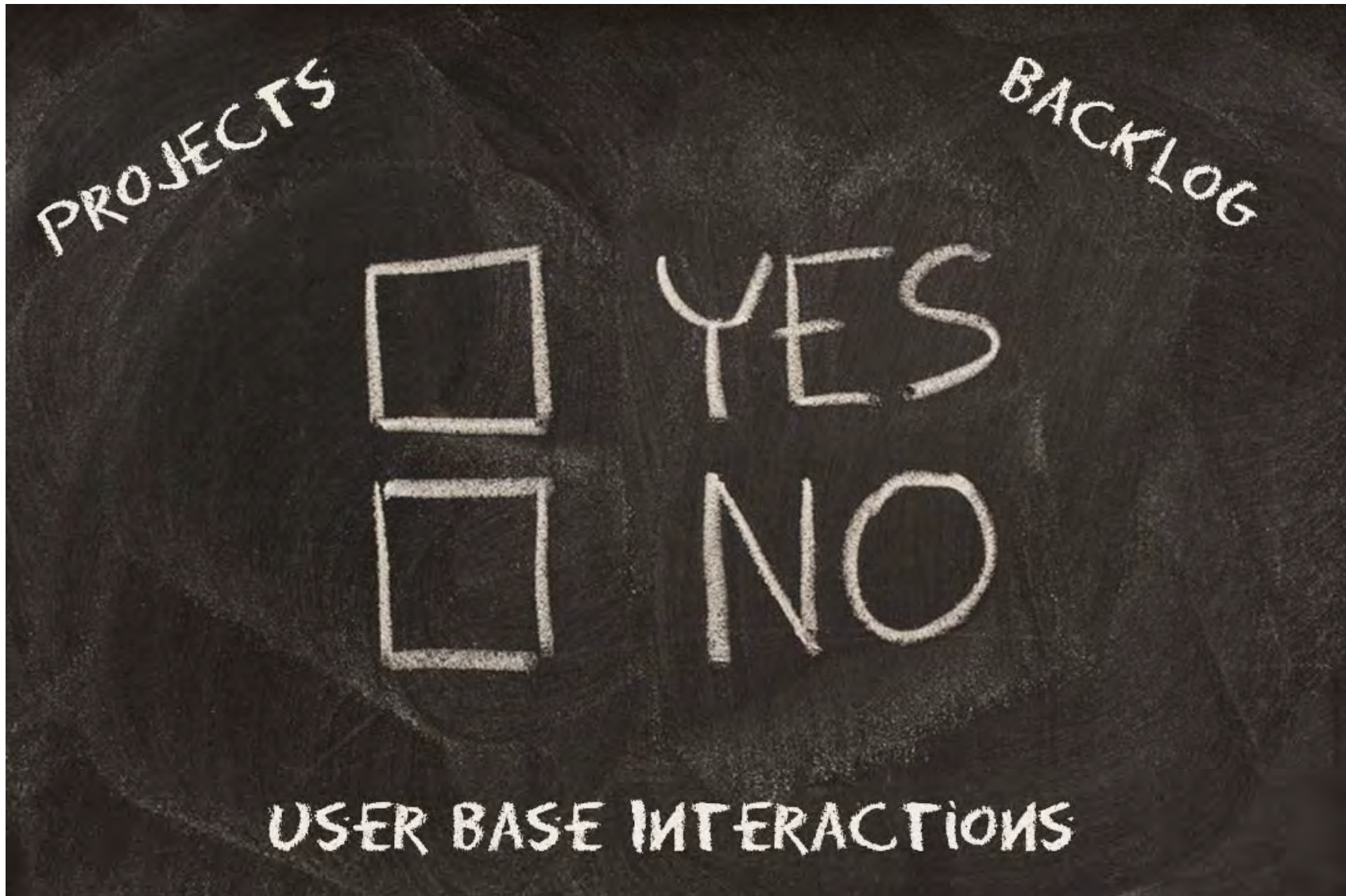
# Strategy Identification



- High Level Strategic Areas
- End State Goals
- Prioritization



# Strategic Validation

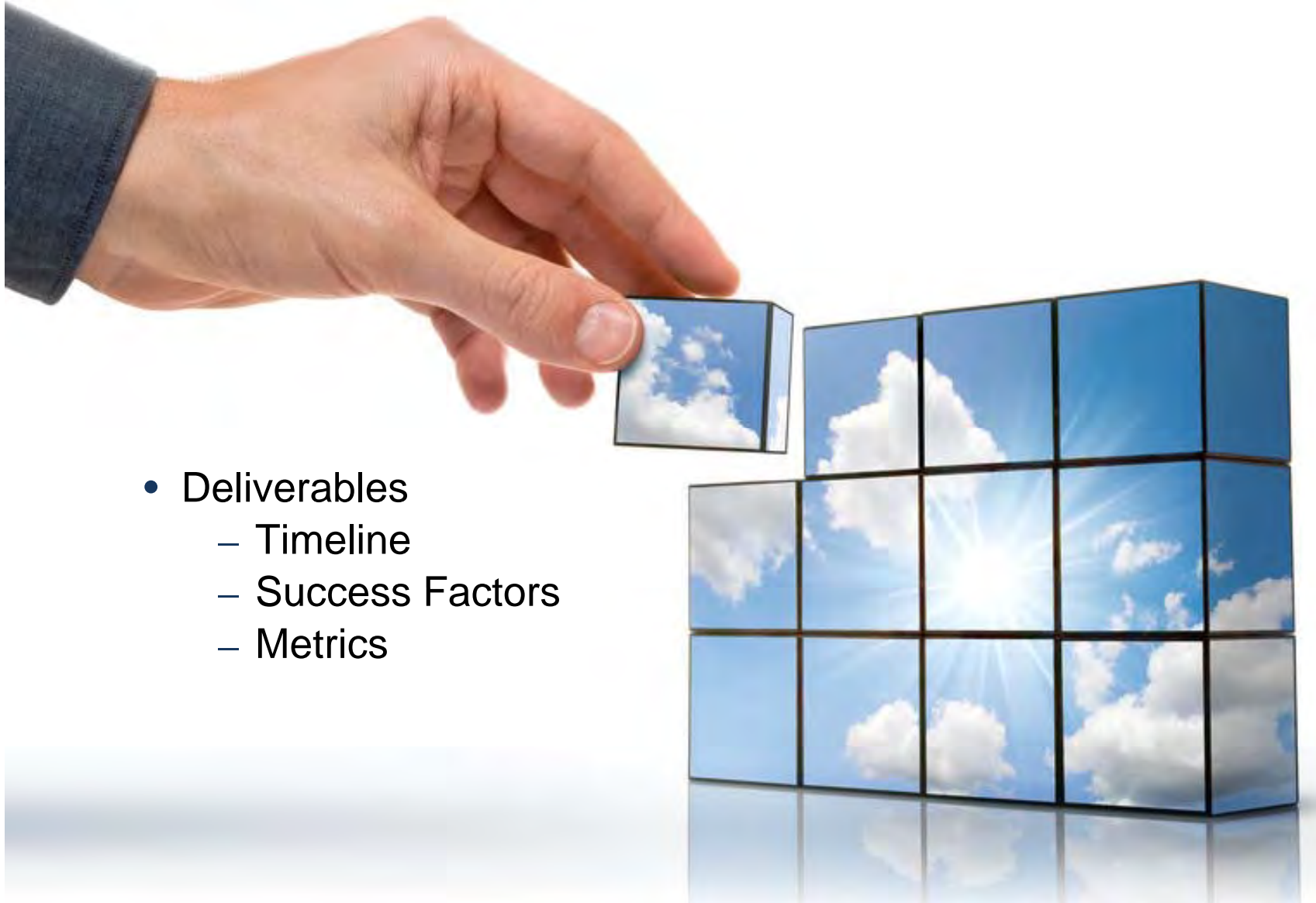


# *Distributed Ownership*

- Strategic Initiative Review Meeting
  - Distributed Ownership
  - Presentation
  - Internalization



# Planning Strategic Execution



- Deliverables
  - Timeline
  - Success Factors
  - Metrics



# Strategic Plan



IM Strategic  
2011 - 2013

## Goal 1: Sustaining the Laboratory

Sustain the operations of the Laboratory by:

- Creating processes and constructs that will deliver a cost planned, executed, and managed effectively to provide value
- Delivering high quality, reliable infrastructure that matches demand
- Providing means for ensuring that organizational human capital is effectively managed
- Developing background integration between systems to ensure data consistency

## Goal 2: Enabling the Laboratory

Enable growth in the Laboratory by:

- Delivering the right information, to the right people, in the right way
- Enabling secure and ever-present connectivity between systems to the Laboratory
- Supporting the Laboratory in establishing a reputation of being a leading edge organization
- Ensuring a robust and capable environment for Laboratory activities

## Goal 3: Transforming the Laboratory

Transforming the Laboratory to a highly agile organization that delivers value to Laboratory mission success.

- Combining technologies, processes and management to create value to Laboratory mission success.
- Ensure business processes that are intuitive and easy-to-work.
- Provide innovative solutions to mission organization challenges
- Realign organizational resources supporting information technology Laboratory activities.

## Goal 4: Protecting the Laboratory

Ensure protection of Laboratory assets by:

- Establishing an outcomes-based risk-management approach that Laboratory is best suited for the evolving security landscape
- Enhancing the Laboratory usage of classified infrastructure and classified programs.
- Identifying and organizing data across the Laboratory, to support Laboratory decision making.
- Creating an established lifecycle for systems that ensure mission through retirement of legacy systems and reapplying resources

## Transforming the Laboratory

### High Performance Workplace

*High Performance Workplace is the development of a framework that engages with organizations Laboratory in transformational activities to Laboratory performance.*

A High Performance Workplace is an environment that combines technologies, processes and management to foster high individual, workgroup, and corporate performance. It includes multiple factors that enhance the ability to deliver business value. It focuses on highly skilled workers so that they can be more productive and innovative. It supports employees in enabling the areas of:

- Learning
- Discovering
- Innovating
- Leading

*The High Performance Workplace initiative will:*

The High Performance Workplace initiative will:

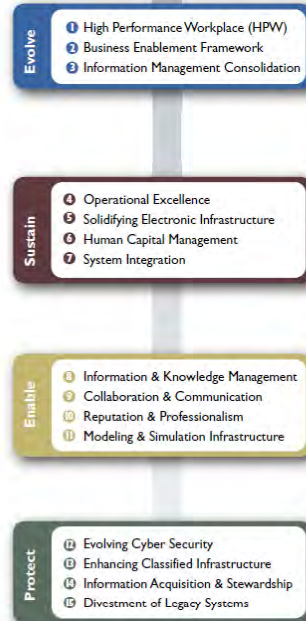
- Empower employees to deliver business value through the effective use of process, information and technology.
- Provide an environment that fosters creativity and innovation.
- Facilitate organizational change to ensure future mission success.

## Roadmap

### IM Strategic Initiative

### 2011 Deliverables

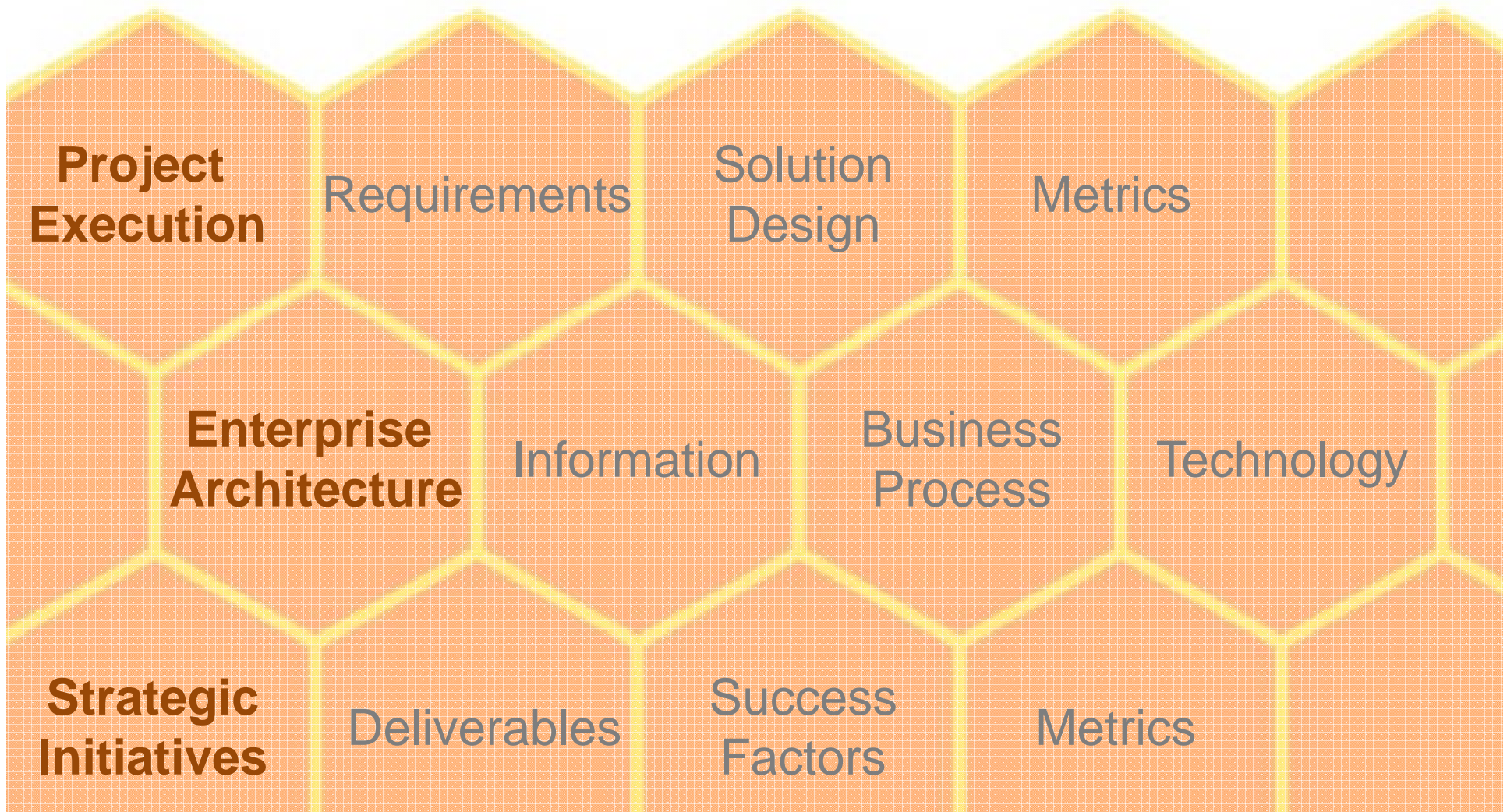
### 2012 Deliverables



- 1 HPW Services (E-mail, calendaring, instant messaging)
- 2 Management systems - mission integration
- 3 Future service roadmaps (HR, PMO, Finance)
- 4 Lab-wide IM assessment
- 5 Integration of Information Services
- 6 Cross-functional Advisory Group for software investments
- 7 Enhanced mobile capabilities
- 8 Voicemail integration with messaging environment
- 9 Identification of strategic business systems (asset portfolio)
- 10 INL Business Intelligence foundation and information value assessment
- 11 Enhanced video conferencing
- 12 HPW FY-12 requirements
- 13 Innovation Community of Practice to identify strategic investments
- 14 New high-speed super-cluster
- 15 Idaho Computing Consortium
- 16 Secure mobile device expansion
- 17 Classified workstation expansion
- 18 INL data dictionary
- 19 IM asset evaluation (identifying \$5 million for commoditization & divestment)

- 1 HPW Services (Internal / external collaboration)
- 2 100% of Lotus Notes divested
- 3 Future service roadmaps (Supply Chain, F&SS, ES&H)
- 4 Lab-wide IM consolidation plan
- 5 IM service optimization (commodity divestment)
- 6 Enhanced telecommuter support services
- 7 Integration of strategic business systems (PMO, Finance, HR)
- 8 Multi-source information aggregation
- 9 INL information benchmark (Hackett)
- 10 INL mobile device applications (e.g. TA, expense report, timesheet)
- 11 Desktop video conferencing
- 12 HPW FY-13 requirements
- 13 HPC data center expansion
- 14 Identity and access management (smart card)
- 15 Virtualized classified architecture
- 16 INL knowledge capture
- 17 INL business information transparency

# Next: IM





## ***Next: Business***

- Strategic Plan = Tool
  - Communicate
  - Re-Engagement
  - Re-Calibration

