

■ Lance B. Eliot, Feature Editor, Elliot & Associates

I.S.: Visions, Missions, and Values

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An I.S. group should always have a stated vision, mission, and a set of core values. Without articulating and communicating these three elements, the I.S. group can appear to be wandering aimlessly and vulnerable to an organizational audit that says I.S. lacks clear direction, and misses out on an opportunity to establish a tone and atmosphere that can aid short-term and long-term actions of I.S.

All three elements must tie together in an integrated way. If the Vision does not seem to connect with the Mission, or the Vision/Mission do not connect with the core values, the resulting lack of integration will undermine the purpose of the three elements and reduce the benefit of having them at all.

Indeed, in today's world the use of any Vision/Mission/Values is immediately susceptible to great cynicism in a Dilbert-minded society (especially by I.S. personnel!). Thus, the Vision/Mission/Values must be sensible, credible, lived by, seriously created and shared, and communicated in a systematic way that emphasizes the importance of the three. An effort that portrays the elements as an edict or platitudes will most likely generate resistance, grumbling, and a backlash against a perceived waste-of-time and more "bureaucratic nonsense."

Thus, the developers of the elements must put careful thought into the formation of the Vision, Mission, and Values. Equally critical is the approach taken to communicate and live with the elements after they have been promulgated in the organization. Do not take the first step if you cannot foresee the subsequent steps.

Understanding the Vision and Mission

Generally, a Vision is a crisp, catchy statement that quickly gets to the essence of the I.S. group and establishes a present and future framework in which I.S. exists. You

might think of a Vision as the title of an article or a lengthy phrase that captures the imagination in a succinct way.

In contrast, a Mission is usually a series of dry, short statements, embodied in a paragraph or so, that gets closer to ground level and identifies something about the application of I.T. to the business. As an aside, the word *Mission* comes from a Latin root meaning "to send"—suggesting that a Mission is what an organization is sent to do.

In most cases, I.S. groups tend to combine the Vision and Mission statement into one collection (where the first sentence of the Vision/Mission paragraph is actually the Vision, while the whole paragraph is taken to be the Mission). This combination of Vision/Mission is usually done to reduce confusion, otherwise it might be too difficult for people to remember "which one of these things is our Vision and which is our Mission" kind of response.

Whether you have a separate Vision and a separate Mission, or combine the two, is not particularly critical, just as long as the result gets across the underlying essence of a Vision and a Mission, namely, to provide a clear picture of the purpose of the I.S. group and how it will help the firm achieve a desirable future.

Some people like to start with a Mission, and then craft a Vision out of the Mission (doing the detailed hard work with the Mission statement first and then lifting out keywords to formulate the Vision). Others like to start with a Vision, and then use the keywords in the Vision to form a detailed Mission statement. Or, some even start with the Values and then work back into the Vision and Mission.

The approach chosen can be any of the above or multiple uses of the above. In most instances, the CIO takes the direct reports to a retreat to work on the Vision, Mission, and Values. The manner of development of the Vision/Mission/Values is then best determined by the culture and interaction



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among the participants formulating the elements (i.e., whatever works best for the folks doing the effort).

It can be hard work formulating a Vision, Mission, and Values for I.S. You need a combination of freedom of thought, ability to write prose, an understanding of what the organizational culture will accept or reject, and a willingness to have your statements "attacked" during iterative refinement. Even after it has been carefully crafted, there will always be those inside I.S. and outside I.S. who will find a way to twist the words such that it sounds confused or like dogma. So be it, at least you have put one together—anyone with constructive comments for improving the thing should be always welcomed (one suggestion: turn the naysayers into additional writers).

Judging the Vision, Mission, and Values

How do you know if the elements that you have drafted are worthy? Overall, they should be able to serve as an umbrella under which all of I.S. is seen.

Here are some questions to pose when reviewing the draft(s):

- Does the Vision/Mission/Values inadvertently exclude some aspect of I.S.?
- When any I.S. member or team makes a decision on hardware, software, etc., do those decisions fit within the Vision/Mission/Values?
- Can it be used as a backdrop against which daily decisions can be made?
- Can it be used as a vehicle for communicating I.S. to the rest of the organization and securing their commitment to working with I.S.?
- Can I.S. strategies be derived entirely from the Vision/Mission/Values?
- Does it provide room for future growth?
- When performing support activities, can I.S. personnel be guided by the Vision/Mission/Values?
- Can I.S.-related projects be guided by the Vision/Mission/Values?

Ideally, the Vision/Mission/Values are inspirational and can rally the troops. When a new person joins I.S., they should be able to read and understand the Vision/

Mission/Values and immediately begin operating in a manner corresponding to the essence of the elements.

Also, ideally, end-users (i.e., clients or customers of I.S.) should be able to be inspired by the Vision/Mission/Values.

Indeed, an important aspect of the I.S. specific Vision/Mission/Values is that they must tie directly to the Vision/Mission/Values of the organization as a whole (assuming the organization already has such a set).

Remember that the I.S. statements must be seen in a context of the I.S. contribution to, and relationship with, the activities of the whole firm. If you cannot tie them at the Vision/Mission/Values level, you will be unlikely to ever tie them at the lower, detailed levels.

Thus, make sure that you have a current set of the company Vision/Mission/Values when developing the I.S. set. You can use the company set as an inspiration to generate the I.S. set (so you see, even the company Vision/Mission/Values are inspirational, as should be the case!).

Even if the company set does not lead immediately to the formation of the I.S. set, at least make sure that after developing the I.S. set that you look back at the company set and find the connections between the two sets.

In other words, the company Vision says X, and that should connect to something in the I.S. set Y. The company Mission statement is W, and that should have connections with the I.S. Mission of Z. The core values of the firm must have corresponding matches somewhere in the values of I.S.

Most firms today have a set of identified Values. Usually, you start the creation of the I.S. Values with the ones pre-determined by the company as a whole. If you lack such a set, here are some words that express commonly adopted values: Adaptability, Cooperation, Courteous, Diligent, Effectiveness, Efficiency, Fairness, Openness, Equality, Innovative, Considerate, and so on.

Conclusion

Developing a credible Vision, Mission, and set of Values for I.S. is a difficult task that requires careful consideration and dedicated effort. Some CIO's belittle the task by

assigning the development to a "non-essential I.S. employee" as nothing more than a time filler. I have seen the result of such misjudgment, including Visions, Missions, and Values that are confused, inane, and immediately taint the I.S. group as out-of-touch with reality.

It is in the best interest of the CIO, the I.S. group, and the organization to properly prepare, communicate, and live by a good Vision, Mission, and set of Values. I have developed many such sets for my clients, and even collected other versions from other CIO's—if you have a good set that you are proud of, please send it to me. On the other hand, if you have a set that needs repair, send those to me as well. ■

Workshop on OM Case/Field Research & Publication

A new element of the Annual Case Workshop at the 1999 DSI Annual Meeting (November 20-23, 1999) will be a special program directed to the development and publication of case and field research in operations management (OM). The Workshop will be held at the same time as the regular case workshop. The intent of this new offering is to foster interest and develop expertise in on-site study as a rigorous, highly-publishable mode of conducting research to develop managerially useful OM theory.

Participants will be selected for the workshop based on the submission of fully or partially completed draft papers employing case or field research methodology in an OM study. Selection criteria relate to likelihood of eventual publication. Selected participants will then be sent three or four similar papers from other selected participants to evaluate and critique based on a brief, standard form supplied to them. The reviews are intended to provide constructive criticism for improving the papers to the point of being publishable.

To apply, send a letter of application, vita, and your OM case/field study paper to Jack Meredith, Editor-in-Chief, Journal of Operations Management, Babcock Graduate School of Management, Wake Forest University, P.O. Box 7659, Winston-Salem, NC 27109-7659 by August 1, 1999. Those selected for participation in the workshop will be notified by September 1.