

Leveraging Microsoft Optimization to Create Your Dynamic IT Roadmap

Executive Summary

Today more and more pressure is being placed on IT to lower costs while fueling innovation and growth to drive greater business value. One backdrop causing this spotlight on IT is the constantly changing and competitive nature of the global marketplace.

According to the Gartner 2008 study, *"Making the Difference: The 2008 CIO Agenda,"* staying ahead of these ever increasing business demands requires a methodical approach to assessing how to best align business imperatives with the IT investments that enable the greatest business impact.

The Microsoft Optimization Models offer CIOs with a robust and systematic process for assessing their IT infrastructure and platform capabilities needed to build a dynamic IT roadmap. This transformative and iterative process shifts IT from a cost center focus into an innovative business growth enabler.

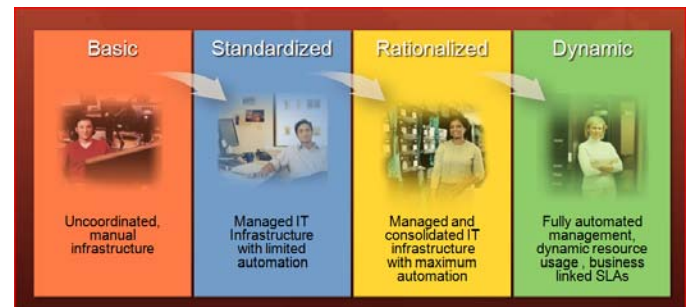
Optimizing IT for the Enterprise

If people are the key to driving business results, the question becomes: What kind of IT infrastructure and platform do you need to support a people-ready business? The answer is simple. You need an infrastructure and platform that advances rather than impedes your business. A people-ready business addresses the last mile of productivity, offering role based technology solutions in a consistent, familiar and easy to use interface with minimum training and support. This shift enables IT to focus its energy on creating IT solutions that drive the business vs. maintaining and supporting systems and people that are perceived as cost center related activities.

Optimization is a structured, systematic process of assessing maturity across IT capabilities, then prioritizing projects to progress towards a Dynamic state. The process begins with a starting point, "where your IT infrastructure and platform is today," and a destination, "where you want it to be." Optimization focuses on aligning or modifying the configuration of organization's IT assets and resources to advance the business towards its desired destination. As a result, IT becomes a more strategic partner to the business.

Microsoft has developed three models—focusing on core infrastructure, business productivity infrastructure, and the application platform—that outline a progression through four stages of Optimization. Each of the models illustrates the strategic value and business benefits of moving from a "basic"

stage of Optimization, where the infrastructure and platform is generally considered a "cost center," toward a "dynamic" infrastructure, where the business value of the infrastructure is clearly understood.



Within each Microsoft Optimization model are key capabilities and sub-capabilities that enable IT to map business drivers and priorities to technology solutions that are integrated across platform capabilities. The output is a phased capability and solutions adoption approach which minimizes risks and delivers incremental benefits throughout the implementation process.

"What makes you different is the reason customers choose your enterprise. A successful enterprise differentiates itself by serving customers in unique and market-leading ways. It creates capabilities, within a strong external context, that are valued in the market and difficult for others to copy. Making a difference that matters requires that information and technology become integral to the execution of enterprise strategy."
--Gartner 2008 study: "Making the Difference: The 2008 CIO Agenda"

The Benefits of Optimization

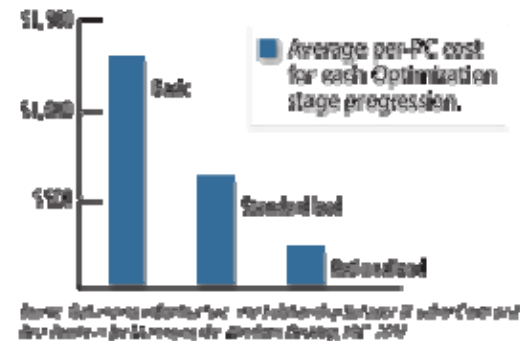
Gaining dramatic cost savings and enabling business growth are primary benefits of executing an Optimization roadmap to progress towards a Dynamic IT. By aligning business priorities and strategies to the technologies that will help deliver the desired business outcomes, IT can deploy solutions that empower people to reach customers more effectively, harness critical business insight, and collaborate across boundaries. Information is a key commodity in the everyday process of doing business, and the IT infrastructure and platform must be designed with business needs in mind. A people-ready business uses IT infrastructure and platform solutions as a foundation to amplify the impact of their people, manage complexity, protect information, control access, and advance the business.

The Microsoft Optimization models have been developed using industry best practices and Microsoft's own experiences with its enterprise customers. A key goal for Microsoft in creating the models was to develop a simple way to use an Optimization framework that is flexible and can easily be used as a benchmark and a roadmap for technical capability and business value.

The first step in using the models is to evaluate what Optimization level you are currently at. Once the current level has been established, the next step is to use the models to develop a plan on how to progress through each level in order to reach the target level needed for maximum business benefit.

Infrastructure and Platform Optimization Drives IT Cost Savings

Analysis of 141 U.S. based organizations with 1,000-20,000 PCs



"[Optimization]...makes it easy to communicate and realize the business value of the infrastructure."

--Kum Chai Shin, Senior Director, Cymer

"We've increased security, improved productivity, and now have the ability to do zero-touch deployments and upgrades."

--Phil Blackwell, Systems Manager, AUSTAR

Core Infrastructure Optimization Model

Core Infrastructure Optimization helps an organization better understand and move toward a more secure, well-managed, and dynamic core IT infrastructure that will help reduce overall IT costs, make better use of IT resources, and make IT a strategic asset for the business. This model supports IT professionals in the management of servers, desktops, mobile devices, and applications, and in achieving efficient resource usage to help you eliminate unnecessary cost and complexity, ensure that your business is always up and running, and establish a responsive infrastructure.

The Core Infrastructure Optimization model defines five capabilities that are required to build a more agile infrastructure. In addition, sub-capabilities are aligned to relevant capabilities to provide additional insight into solution area opportunities.

Identity and Access Management

This capability describes ways you should consider managing people and asset identities, solutions that should be implemented to manage and protect identity data (synchronization, password management, and user provisioning, to mention few), and how to manage access to resources from corporate mobile users, customers, and partners outside of a firewall.

Desktop, Device, and Server Management

This capability describes how you should consider managing desktops, mobile devices, and servers as well as how to deploy

patches, operating systems, and applications across the network. It also provides guidance on how you can leverage virtualization and branch office technologies to improve your IT infrastructure.

Security and Networking

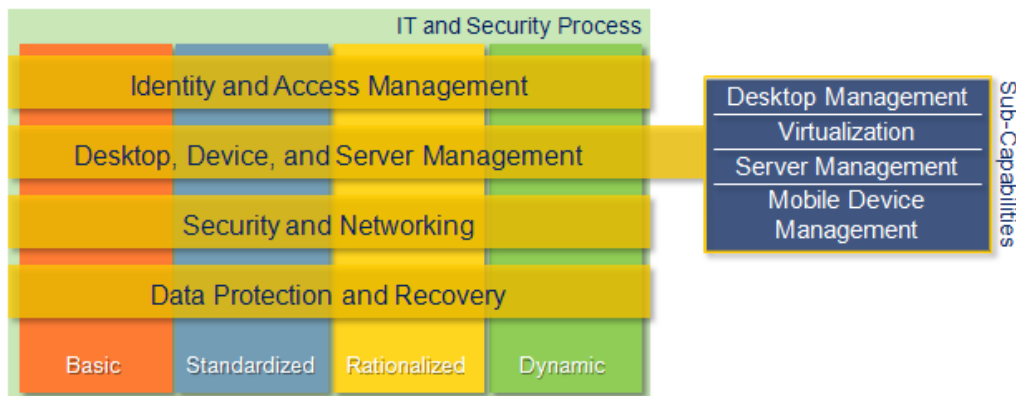
This capability describes what you should consider implementing in your IT infrastructure to help guarantee that information and communication are protected from unauthorized access. This capability also describes mechanisms to protect your IT infrastructure from denial attacks and viruses while preserving access to corporate resources.

Data Protection and Recovery

This capability provides guidance on structured backup, storage, and restore management. As information and data stores proliferate, organizations are under increasing pressure to protect that information and provide cost-effective and time-efficient recovery when required. This capability provides guidance in this area.

IT and Security Process

This capability provides proven best practice guidance on how to cost-effectively design, develop, operate, and support solutions while achieving high reliability, availability, and security. While rock-solid technology is necessary to meet demands for reliable, available, and highly secure IT services, technology alone is not sufficient; excellence in processes and people (skills, roles, and responsibilities) is also needed.



Business Productivity Infrastructure Optimization Model

The Business Productivity Infrastructure Optimization model includes a complete set of desktop and server software and services to help streamline the way you and your people do business while increasing IT effectiveness. Empower your people in a changing workplace with a unified infrastructure that simplifies the way your people communicate, share expertise, gain business insight and find information, all by using familiar 2007 Microsoft Office system applications that help you manage IT costs and complexity.

Business Productivity Infrastructure Optimization technologies can help organizations succeed in a diverse global market, with customers, partners, and suppliers who work together across cultures and continents. It includes five capabilities required to optimize your business productivity structure. In addition, sub-capabilities are aligned to relevant capabilities to provide additional insight into solution area opportunities.

Unified Communications

Unified Communications technologies help streamline communications between people and organizations, regardless of medium, platform, device or location. By empowering end-users with a familiar set of tools, built on an enterprise-ready, scalable and easily-managed software-powered architecture, Microsoft Unified Communications breaks down communication silos and extends existing communications investments, while enabling business process innovation.

As structured and unstructured data converge with other types of communications like voice, presence, and conferencing, this capability provides a framework on how IT can leverage their infrastructure to provide new (or improved) IT services that simplify how people work together.

Collaboration

Collaboration technologies deliver familiar, pervasive, and best-of-breed capabilities that easily integrate with desktop productivity tools. By empowering end users with a familiar set of tools, built on a scalable, security-enhanced, and easily managed platform, Collaboration solutions from Microsoft can

extend the value of your current IT investments while enabling business process innovation.

This capability describes how you can use workspaces and portals to provide a productive collaboration environment where your IT department can define processes and standard solutions that can be customized to meet specific business needs.

Enterprise Content Management

Enterprise Content Management technologies deliver well-integrated solutions to manage the end-to-end lifecycle of a wide range of content and for streamlining collaborative business processes. This capability emphasizes the implementation for web authoring, forms, documents, Web content management, and record management.

Enterprise Search

Enterprise Search technologies empower people to find information and expertise anywhere in the organization. By optimizing the Enterprise Search capability, IT professionals can manage, secure, scale, and extend search as an integrated part of a broader information management infrastructure. This capability describes how you should consider integrating information with standard search capabilities that take into consideration different formats, data sources, and line-of-business applications.

Business Intelligence

Business Intelligence technologies provide easy-to-use information directly where individuals work, collaborate, and make decisions. This capability includes reporting, analysis, and performance management technologies that can improve business insight by allowing your IT department to define standard reports, methodologies, and metrics that can be exposed and accessed by users in a rich user interface and based on roles to assure that information is available to people with the right set of permissions.



Application Platform Optimization Model

Application Platform Optimization enables you to drive the business forward by quickly delivering connected, flexible, and highly secure applications. It provides a user-centric experience, helping amplify the productivity and efficiency of your employees and improving the customer experience; fast and easy integration across existing software and new Web-based applications; and the ability to connect mission-critical applications while providing Internet-class scalability and robust performance.

Each Optimization model includes specific technical capabilities that provide a comprehensive set of solutions to help advance a customer's infrastructure and platform Optimization levels. The Application Platform Optimization model defines five capabilities that are necessary to build a more agile application platform. In addition, sub-capabilities are aligned to relevant capabilities to provide additional insight into solution area opportunities.

User Experience

This capability defines how user experience should be included as part of design and development of applications to improve usability of applications while providing a richer interface regardless of what platform the application is being developed for (Web, rich client applications, smart devices, and more).

Business Intelligence

The Microsoft vision for Business Intelligence (BI) is to help you improve your organization's success by providing business insights to all employees leading to better, faster, more relevant decisions. Microsoft continues to invest heavily in BI. Key investment areas across Microsoft for BI include performance management, collaboration, visualization, analysis and reporting, data mining, data integration, data warehousing, and development.

Service-Oriented Architecture (SOA) and Business Process

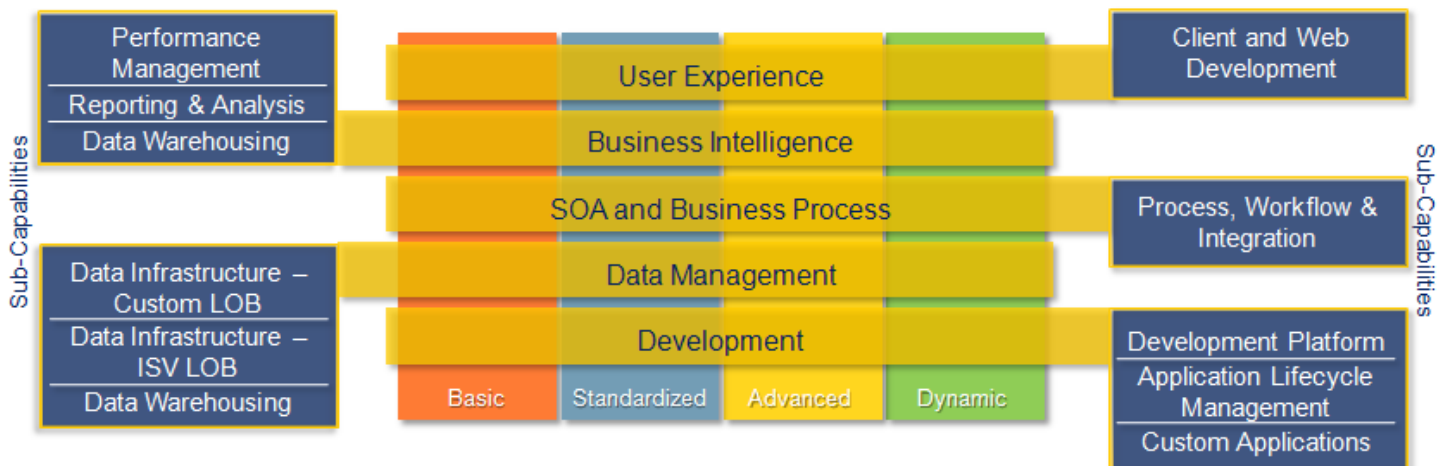
Business Process Management (BPM) technology integrates heterogeneous systems (Enterprise Application Integration or EAI) between organizations and trading partners and manages processes (such as BPM) that span people, partners, and software services. Microsoft BizTalk® Server provides these capabilities, along with easy administration and management functionality "in the box," enabling you to build and deploy business process management solutions that drive increased efficiency, growth, and competitive advantage.

Data Management

This capability describes things you should consider when implementing an integrated data management and analysis solution that can enable you to reliably manage mission-critical information and confidently run today's increasingly complex business applications.

Development

This capability addresses the needs of information technology decision makers and developers working alone or in teams to deliver high quality, secure applications that connect business processes. Microsoft application platform solutions offer the best integrated software development platform to help you manage the application life cycle, increase team collaboration and productivity, and improve software quality. It provides an integrated server with a single data store and built-in collaboration and quality tools for your entire development team together with a common development framework for Web services, rich client applications, smart devices, and more.



Levels of Optimization

As you move from one level to the next, you can drive more efficiency, collaboration, and agility across the IT life cycle:

- Developers become part of more efficient and collaborative development teams.
- IT professionals use familiar tools to manage and deliver applications more effectively.
- Business users can manipulate reports, optimize business processes, and share information.

Level 1: Basic

The basic infrastructure and platform is characterized by manual, localized processes; minimal central control; and non-existent or unenforced IT policies and standards regarding security, backup, image management and deployment, compliance, and other common IT standards. There is a general lack of knowledge regarding the details of the infrastructure and platform that is currently in place and which tactics will have the greatest impact to improve upon it.

The overall health of applications and services is unknown due to a lack of tools and resources. Data is stored in file shares and personal drives with disparate search tools. Records management is through manual, paper-based processes. There is no vehicle for sharing accumulated knowledge across IT.

Customers benefit substantially by moving from a basic level to a standardized level—dramatically reducing costs through developing standards, policies, and controls with an enforcement strategy, automating many manual and time consuming tasks, adopting best practices, and aspiring to make IT a strategic asset rather than a burden.

Level 2: Standardized

The standardized infrastructure and platform introduces controls through the use of standards and policies to manage desktops and servers, how machines are introduced to the network, and the use of Active Directory® directory services to manage resources, security policies, and access control. Customers in a standardized state have realized the value of basic standards and some policies, yet they are still quite reactive.

Generally all patches, software deployments, and desktop services are provided through medium touch with medium to high cost. However, they have a reasonable inventory of hardware and software and are beginning to manage licenses. Content is consolidated and records retention is managed using disconnected repositories with basic search capabilities. Security measures are improved with a locked down perimeter but internal security may still be a risk.

Customers benefit by moving from this standardized state to a rationalized state with their infrastructure and platform by gaining substantial control and having proactive policies and

processes that prepare them for the spectrum of circumstances from opportunity to catastrophe. Service management becomes a recognized concept and the organization is taking steps to implement it.

Level 3: Rationalized

The rationalized infrastructure and platform is where the costs involved in managing desktops and servers are at their lowest and processes and policies have matured to begin playing a large role in supporting and expanding the business. Security is very proactive and responding to threats and challenges is rapid and controlled.

The use of zero-touch deployment minimizes costs, the time to deploy, and technical challenges. The number of images is minimal and the process for managing desktops is very low touch. Organizations at a rationalized level have a clear inventory of hardware and software, and only purchase those licenses and computers they need. Document and records management and search are considered as strategic enablers for the business and are integrated with one or more business productivity infrastructure investments and IT has defined processes and procedures to provision search integration with new line-of-business applications.

Customers benefit on a business level by moving from this rationalized state to a dynamic state. The benefits of implementing new or alternative technologies to take on a business challenge or opportunity far outweigh the incremental cost. Service management is implemented for a few services with the organization taking steps to implement it more broadly across IT.

Level 4: Dynamic

Customers with a dynamic infrastructure and platform are fully aware of the strategic value their infrastructure provides in helping them run their business efficiently and staying ahead of competitors.

Costs are fully controlled; there is integration between users and data, desktops, and servers; collaboration between users and departments is pervasive; and mobile users have nearly on-site levels of service and capabilities regardless of location.

Processes are fully automated, often incorporated into the technology itself allowing IT to be aligned and managed according to the business needs. Additional investments in technology yield rapid, measurable benefits for the business.

Customers benefit from increasing the percentage of their infrastructure and platform that is dynamic by providing heightened levels of service, competitive and comparative advantage, and taking on bigger business challenges. Service management is implemented for all critical services with service level agreements and operational reviews.

Toward Dynamic IT

So, what will your business look like when it arrives at the final level of Optimization?

- Integration between users and data, desktops and servers, and collaboration between users and departments, will be pervasive.
- Automated processes will be aligned to business goals.
- Additional investments in technology will yield specific, rapid, and measurable benefits to the company.
- Self-provisioning software and other technologies important for data retention and auditing will result in improved reliability, lowered costs, and increased service levels.
- Your IT will feature the capability to adapt IT services easily to changing business needs.
- The business will be more aware of the strategic value of its dynamic systems infrastructure in running its operations efficiently and staying ahead of its competitors.

While there are company-level benefits when investments are made in technologies that enable more dynamic systems, the list business and IT professionals benefit can too. The more people are enabled by systems that can self-manage to adapt to changing business demands, the more empowered they will be to contribute to the success of the business.

"With an [Optimized] platform, we have increased agility within our infrastructure and gained more transparency into costs."
--Keith Funnel, CCM, EDF Energy

Begin Creating Your Dynamic IT Roadmap Today

Every journey has a beginning. Using the Microsoft Optimization models as your roadmap, you can begin to standardize and advance your organization's IT infrastructure and platform capabilities into a cost effective, strategic business asset that can quickly align to your changing business needs by connecting people, information and business processes.

Begin your Optimization journey today by visiting <http://www.microsoft.com/optimization/> to:

1. **Read compelling case studies** of how successful companies are using the Microsoft Optimization models to drive business value for their companies.
2. **Begin to build your Dynamic IT Roadmap** by analyzing your current infrastructure and platform with the Optimization Self-Assessment Tool. The assessment tool provides a personalized and private Optimization score, peer comparison, and value assessment for your organization. The tool generates a comprehensive report that can serve as an actionable roadmap and incentive for optimizing your IT infrastructure and platform. Get answers to questions like:
 - Where does my organization rank on the Optimization model?
 - How do we compare to the competition? What roadmap should we follow?
 - What is the quantifiable value of improving?
3. **Contact your Microsoft Account Manager or Microsoft Partner** to begin developing your Dynamic IT Roadmap.