



CONFESSIONS OF A SUCCESSFUL CIO

How the Best CIOs Tackle Their Toughest
Business Challenges

DAN ROBERTS BRIAN P. WATSON

Foreword by SUSAN CRAMM



WILEY

Contents

[Foreword](#)

[Preface](#)

[Acknowledgments](#)

[Chapter 1: The Anticipator: Filippo Passerini](#)

[Chapter 2: The Rocket Scientist: Rebecca Rhoads](#)

[Chapter 3: The Fixer: Steve Bandrowczak](#)

[Chapter 4: The Pilot: Carol Zierhoffer](#)

[Chapter 5: The Conductor: Lynden Tennison](#)

[Chapter 6: The Decider: Wayne Shurts](#)

[Chapter 7: The Realist: Don Imholz](#)

[Chapter 8: The Accidental CIO: Sheleen Quish](#)

[Chapter 9: The Innovator: Greg Schwartz](#)

[About the CIOs](#)

[About the Authors](#)

[Index](#)

[End User License Agreement](#)

Additional praise for *Confessions of a Successful CIO: How the Best CIOs Tackle Their Toughest Business Challenges*

“Everyone knows we learn best by experience. But not everyone has the opportunity to have so many experiences. The best of us learn from other people’s experiences, in addition to our own. This collection of stories of leadership moments faced by giants in our field is a great opportunity to grow.”

— **June Drewry, Director of the Society for Information Management’s Leadership Development Institute and former Global CIO, Chubb, Aon, and Lincoln National**

“I enjoyed reading the CIO confessions; real, insightful, and inspiring stories of leadership, across the challenging and broad spectrum of business, people, process, and technology aspects of today’s CIO responsibilities in forward-thinking corporations. Each story provides relevant approaches and examples of personal behavior for successful, and in some cases bold, leadership at the complex intersection of technology and business. The practical and no-nonsense storytelling triggers reflection and comparisons with similar situations any CIO will encounter and is helpful to formulate the right style and approach, or validate the chosen path to sustainable business value creation and personal success.”

— **Roland Paanakker, former CIO, Nike Inc.**

*“In *Confessions of a Successful CIO*, the authors present tremendous insights into the philosophy and approaches of a set of truly world-class CIOs. Their stories are incredibly insightful, following their journeys through challenging, big-bet situations that they converted into major opportunities to support the transformation of their organizations. The stories so poignantly illustrate the critical leadership approaches that these CIOs employed to achieve amazing results. These stories provide any current or aspiring CIO with incredible examples of how to truly achieve the full potential of IT in their organizations.”*

—Steve Morin, CIO, Bright Horizon

“Confessions of a Successful CIO is a compilation of genuine and inspirational stories sure to motivate IT leaders in pursuit of achieving transformational successes. The influential CIOs profiled in this book tell their stories with such authenticity; you will feel invigorated and challenged to pursue excellence in your own career.”

—Mary Gendron, Senior Vice President and CIO, Celestica

*“*Confessions of a Successful CIO* is filled with a ton of insightful leadership lessons and real, actionable advice necessary for the modern-day CIO to be successful, as told through the stories of top-flight CIO leaders. A must-read for those already in the role—and certainly for those who aspire to be IT leaders.”*

—Stuart Kippelman, CIO, Covanta Energy

“Each story provides ‘real world’ experiences, along with leadership wisdom and a boost of energy, for what all IT organizations are trying to do today—create value. This is a great reminder that the role of CIO is not for the faint of heart, but with courage and leadership great things can and do happen.”

—Dede Ramoneda, Group Vice President and CIO, First Citizens Bank

“The job of a CIO is becoming increasingly demanding and challenging, no matter what vertical industry you may be a part of. In this book, we have the opportunity to read the stories told by some of the most exemplary CIOs out there, who not only faced up to the demands and challenges but created excitingly innovative approaches to high-stakes situations that would likely make or break their careers. If you are a CIO, this book will both inspire you and challenge you to new ways of thinking.”

—David L. Miller, Vice Chancellor and CIO, University of Arkansas for Medical Sciences

“*Confessions of Successful CIO* shares mini-epic stories to visualize real time, tough business problems and how persevering high-powered CIOs solve issues to reach business goals. As an IT executive, placing the art of IT over the science of IT demystifies how we all can reach the best outcomes with our customers and business value.”

—Ben Berry, Chief Technology Officer, City of Portland

“Roberts and Watson have done a terrific job capturing these virtues with inspirational lessons from some of the top CIOs in the business. Taking advantage of the knowledge and wisdom collected within is like a baseball player getting batting tips from 10 of the best hitters in the game!”

— Jay Ferro, CIO, American Cancer Society

“The testimonials are great, packed with insights that are highly transferable across industries. The method of transferring these insights through the stories of life experiences makes them memorable and actionable with immediate applicability and impact.”

—James Swanson, CIO, Monsanto

“The natural, story-type flow about these CIOs is easy to consume, and readers can really relate to their stories and principles. At times it seemed like a mirror to some of my own experiences and very good net/simplification of the principles of a CIO role in today’s world: people and leadership first, truly engaging in the business, and driving transformational changes to the portfolio that clearly impact revenue, costs, and client retention.”

—Mike Gioja, CIO/Senior Vice President IT, Product Management & Development, Paychex

“When it comes to pragmatic advice, this book is it! *Confessions of a Successful CIO* focuses on translating the experiences of successful CIOs into attributes of success. A more traditional CIO can get caught up in the focus of the Big Four: Social, Mobile, Cloud, and Big Data. This book, however, appropriately places the focus on the leadership required and the roles needed to organize and utilize technology for competitive advantage. It takes bold leadership to recognize the power of technology to enable business results. The collection of experiences presented in this book provides insight for CIOs and other executives to adopt in their personal quest to bring transformative change to the customer experience, operational capability, and shareholder results. Readers will find the necessary tools to navigate the C-suite, the courage to make a difference, and the inspiration to focus on what matters most.”

—Victor Fetter, CIO and Managing Director, LPL Financial

“The lessons detailed by the various CIOs caused me to think of several similar and daunting challenges in my own career as a CIO. Once again, the lessons learned are valuable and they should be repeated: work closely with your clients, focus on the bottom-line of the organization, and always move toward ‘how am I going to contribute to team success?’. This book inspires me to reenergize myself and the team through exemplary leadership and contribution to organizational success. If I don’t contribute significantly as a leader, someone else surely will (and, that’s bad).”

—Scott Culbertson, Vice President/CIO, UGI Utilities

Founded in 1807, John Wiley & Sons is the oldest independent publishing company in the United States. With offices in North America, Europe, Asia, and Australia, Wiley is globally committed to developing and marketing print and electronic products and services for our customers' professional and personal knowledge and understanding.

The Wiley CIO series provides information, tools, and insights to IT executives and managers. The products in this series cover a wide range of topics that supply strategic and implementation guidance on the latest technology trends, leadership, and emerging best practices.

Titles in the Wiley CIO series include:

The Agile Architecture Revolution: How Cloud Computing, REST-Based SOA, and Mobile Computing Are Changing Enterprise IT by Jason Bloomberg

Architecting the Cloud: Design Decisions for Cloud Computing Service Models (SaaS, PaaS, and IaaS) by Michael Kavis

Big Data, Big Analytics: Emerging Business Intelligence and Analytic Trends for Today's Businesses by Michael Minelli, Michele Chambers, and Ambiga Dhiraj

The Chief Information Officer's Body of Knowledge: People, Process, and Technology by Dean Lane

CIO Best Practices: Enabling Strategic Value with Information Technology (Second Edition) by Joe Stenzel, Randy Betancourt, Gary Cokins, Alyssa Farrell, Bill Flemming, Michael H. Hugos, Jonathan Hujsak, and Karl Schubert

The CIO Playbook: Strategies and Best Practices for IT Leaders to Deliver Value by Nicholas R. Colisto

Decoding the IT Value Problem: An Executive Guide for Achieving Optimal ROI on Critical IT Investments by Gregory J. Fell

Enterprise Performance Management Done Right: An Operating System for Your Organization by Ron Dimon

Information Governance: Concepts, Strategies and Best Practices by Robert F. Smallwood

IT Leadership Manual: Roadmap to Becoming a Trusted Business Partner by Alan R. Guibord

Managing Electronic Records: Methods, Best Practices, and Technologies by Robert F. Smallwood

On Top of the Cloud: How CIOs Leverage New Technologies to Drive Change and Build Value Across the Enterprise by Hunter Muller

Straight to the Top: CIO Leadership in a Mobile, Social, and Cloud-based World (Second Edition) by Gregory S. Smith

Strategic IT: Best Practices for Managers and Executives by Arthur M. Langer and Lyle Yorks

Strategic IT Management: Transforming Business in Turbulent Times by Robert Benson, Piet Ribbers, and Ronald Billstein

Transforming IT Culture: How to Use Social Intelligence, Human Factors, and Collaboration to Create an IT Department That Outperforms by Frank Wander

Unleashing the Power of IT: Bringing People, Business, and Technology Together, Second Edition by Dan Roberts

The U.S. Technology Skills Gap: What Every Technology Executive Must Know to Save America's Future by Gary

J. Beach

CONFESSIONS OF A SUCCESSFUL CIO

**HOW THE BEST CIOs TACKLE THEIR
TOUGHEST BUSINESS CHALLENGES**

**Dan Roberts
Brian P. Watson**

WILEY

Cover photos: Courtesy of the authors

Cover design: Wiley

Copyright © 2014 by Dan Roberts and Brian P. Watson. All rights reserved.

Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, Inc., 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600, or on the Web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

For general information on our other products and services or for technical support, please contact our Customer Care Department within the United States at (800) 762-2974, outside the United States at (317) 572-3993 or fax (317) 572-4002.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Cataloging-in-Publication Data:

Roberts, Dan (Dan D.), 1963–

Confessions of a successful CIO : how the best CIOs tackle their toughest business challenges / Dan Roberts, Brian P. Watson.

pages cm. — (The Wiley CIO series)

Includes bibliographical references and index.

ISBN 978-1-118-63822-4 (hardback) — ISBN 978-1-118-84930-9 (ePDF) —
ISBN 978-1-118-84928-6 (ePub)

1. Chief information officers. 2. Information technology—Management. 3. Chief
information officers—Case studies. 4. Information technology—Management—
Case studies. I. Watson, Brian P., 1978 II. Title.

HD30.2.R6275 2014

658.4'038—dc23

2014000598

To the men and women of our armed forces, active or veteran. And to organizations such as Workforce Opportunity Services (WOS) and Darkhorse Benefits, who are committed to helping our veterans build strong corporate careers, leveraging their unique values and competencies in the private sector—and, once again, building an even stronger America.

FOREWORD

I love this book. It's informative, inspirational, and memorable. Each chapter reads like a mini suspense novel, complete with heroes, villains, and cliffhangers. It's not really a book, but a compilation of stories about leaders who have transformed their companies with technology. As a reader, I felt like I was in the inside circle, privy to information usually shared over a drink.

The leaders profiled within did more than they thought they could in situations that are more challenging than most. We learn from their mistakes and successes, and are emboldened by their courage and discipline. The narrative format allows us to record the stories neatly away in our memories, allowing us to hit "replay" when we need them the most.

Leading with technology is, first and foremost, about leadership. While there is no one-size-fits-all road to success, great leaders, like the ones profiled within this book, are marked by a unique set of qualities: passion and drive to make a positive difference, the ability to engage others to chart the future and define the path, and the paradoxical ability to maintain optimism and perseverance through difficult circumstances.

With courageous and disciplined leadership as the foundation, the other factor that distinguishes these leaders is a level of technology smarts that is only born from experience. Technology-smart leaders know how to identify (in the words of one of the CIOs profiled here) the "art of the possible" amid the complex assortment of desired outcomes, existing capabilities and complexities,

and various resources—technical and organizational—that can be applied to the transformational journey.

As described within, the art of the possible entails placing big bets and buying down risks by emphasizing people over process. This is an important message, one that is largely missing from the left-brain-oriented literature that dominates the technology press. Do a tag cloud on this book, and words like *business*, *team*, and *people* will dominate, while *service catalog*, *architecture*, and *process* appear in the background, if at all.

These pages include timeless lessons on how to exploit technology to the benefit of the business and the people within. This isn't simply a book for CIOs or technology professionals. For large businesses or small—or somewhere in between—managing technology assets is an essential part of everyone's job, and absorbing the insights of this book will give leaders a realistic picture of what it takes to exploit technology and transform businesses.

Get ready to hunker down and learn from the best. Keep your pen close at hand, as you will want to underline and notate insights that resonate and ideas that ignite. Put yourself in the shoes of the leader. Pause at the key decision points and decide for yourself what goals you would set and how you would proceed before turning the pages and letting the story unfold.

These novelettes will encourage you to strive to be best version of yourself. They will inform, challenge, and inspire you to work even harder to become the leader you were uniquely created to be.

Use what you learn to enrich your own leadership narrative. Brian, Dan, and I look forward to reading about it!

Susan Cramm

Leadership Coach and Author,

*8 Things We Hate About I.T.: How to Move Beyond the
Frustrations and Form a New Partnership with I.T.*

PREFACE

Welcome to *Confessions of a Successful CIO*. Early warning: This isn't your normal book on IT leadership.

Most books in this category focus on a theory—very smart people espousing their ideas about the CIO role, how it will change, what current and aspiring IT leaders must do to succeed. Those books are valuable, and they provide an inordinate amount of useful, actionable ideas for today's IT leaders.

We might have our own ideas about those things, but we thought it best to leave the theory to smarter folks. We came up with a different approach: Find the best CIOs in the United States—arguably, in the world—and tell their stories.

What do we mean by “stories?” It's relatively simple: We asked these respected, acclaimed IT leaders to walk us through the toughest business challenge they've ever faced, how they tackled it, and what they learned from it. The stories we heard—and that you're about to read—are, simply put, awe-inspiring. We've been working with or writing about IT leadership for more than 35 years combined, but the stories in this book were beyond what we expected—and will continue to amaze for a very long time.

All that said, the hardest task was selecting those CIOs. We may have years of experience interfacing with them, but we knew we couldn't take on such a task alone. There's another piece of magic in this book: To pick these CIOs, we called on some of the most prominent thought leaders in the CIO universe to help us pick our nine.

Meet our expert panel:

- Susan Cramm, who graciously wrote the Foreword, is the author of the acclaimed book, *8 Things We Hate About I.T.* A former CFO and CIO, Susan provides executive coaching to Fortune 500 companies and writes a blog for *Strategy+Business*.
- Shawn Banerji is a managing director in the Global Technology Sector at Russell Reynolds Associates. He is a senior member of the firm's Information Officers Practice and a trusted advisor to global corporations seeking the IT leadership to transform and optimize their businesses. Shawn is frequently sought out by both the media and academia as a thought leader on the CIO role.
- Gary Beach is publisher emeritus of *CIO Magazine* and has spent more than 30 years analyzing the CIO role. His book, *The U.S. Technology Skills Gap*, was a business best seller in 2013.
- Barbra Cooper spent more than 30 years in IT leadership in the financial, technology, government, and automotive sectors. She retired in 2013 after serving as CIO of Toyota Motor Sales and was inducted into the CIO Hall of Fame in 2007.
- Peter High is president of Metis Strategy, an IT strategy consultancy that counts some of the world's elite IT leaders as clients. He analyzes the CIO role for the Forbes CIO Network and hosts the Forum on World Class IT podcast, an offshoot of his best-selling book, *World Class IT: How Business Succeeds When Technology Triumphs*.
- Art Langer is academic director and faculty member of the Master of Science in Technology Management Program at Columbia University and a contributor to the *Wall Street Journal's CIO Journal*. Art is also founder and

chairman of Workforce Opportunity Services, a 501(c)(3) nonprofit.

In working with these all-stars—and hearing their no-holds-barred input—we decided on a few things in terms of criteria. We could just go to the top Fortune 500 companies and interview their CIOs, but we decided, in this case, that size doesn't matter. Sure, some of the CIOs in this book come from large companies, household names, or recognizable brands, but that's not what got them here.

What got them here is simple. They're leaders, not techies. They talk business, not bits and bytes. The CIO of today—and most certainly of the future—needs to navigate the C-suite the same way the other occupants do. Pride in the function is commendable, but not if it stops there.

Once we chose the CIOs, we interviewed them to get the inside story of their own biggest business challenges. The stories we heard were incredible, and in them, we heard several major themes repeatedly:

- **Bet the farm.** These leaders are not afraid to take on the big risks. They're not afraid to pitch the big ideas, because they know they can speak the language and justify the investment.
- **Answer the call.** These leaders stepped up when they were called to action—oftentimes to help save their companies' futures. This requires a confidence in their abilities, and in their own experiences, that not every leader has.
- **People come first.** These leaders understand the value their people bring to their organization. They don't treat them like a number or an interchangeable part.
- **Decisiveness makes all the difference.** Despite their human side, these leaders understand that they need to

make tough decisions that affect not only their people but also their company's health.

- **Results matter.** These leaders don't do pie-in-the-sky research and development or implement the latest bright, shiny objects without knowing the business case and the long-term business value. They're more focused on enabling and improving the business and on driving the all-important metrics that do that.

So, in the end, maybe there is a theory. The best IT leaders do all those things.

And by telling their stories, we hope that the current and future generations of IT leaders will use these case studies to learn, to teach, to inspire, and to elevate our profession to higher, more game-changing levels.

ACKNOWLEDGMENTS

Dan and Brian would like to thank: The 9 “Bet-the-Farm” CIOs who make this book what it is. Although exceptionally busy, each made the time to participate in the spirit of paying it forward to the next generation of leaders. All of these phenomenal leaders brings their own vision, perspective, and leadership style to everything they do, but as a unit, they are the oracles and instructors for any and all who hope to rise to the CIO level. One of their most striking attributes is their ability to answer the call when their businesses need them most. We’re just happy they answered ours and so humbly shared their stories, successes, and failures.

Our expert panel, who collectively and individually helped us identify the CIOs in this book, giving us the perspective we needed going in and the validation we needed along the way. Shawn Banerji, Gary Beach, Barbra Cooper, Peter High, and Art Langer are fantastic thought leaders and representatives of this noble community we call home, and we have the greatest appreciation for their contributions.

Susan Cramm, another member of our expert panel, graciously wrote our Foreword. She’s one of the smartest, sharpest people in the executive leadership arena, and we’re thankful for all the great contributions Susan has made to current and future IT leaders. And we’re incredibly thankful that she made the time to be a constant source of enthusiasm and encouragement throughout the writing process (and way, way before). And she happens to be the genius who came up with the title!

To folks like June Drewry, Abbie Lundberg, David Buckholtz, Steve Morin, Susan Courtney, Dennis L’Heureux,