# Seasoning Your Infrastructure with Oil and Vinegar

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In this article, we describe some of these factors, and the important roles of strategic and tactical processes.

Just as a hearty salad can improve your personal health, robust processes can improve the health of an IT infrastructure. Seasoning your salad with the proper mixture of vinegar and oil makes the salad more appetizing, and hence, more nutritious. Similarly, seasoning your infrastructure processes with the proper mixture of strategic and tactical orientations can make them more appealing, and hence, more effective.

It is important to understand which infrastructure management processes are strategic and which are tactical because each of these types of processes integrate with, and depend on, other processes for optimal use. For example, production acceptance, change management, and problem management all interact with each other when implemented properly. Knowing which of these three key processes is tactical versus strategic helps to better understand their relationships to each other.

Just as saturating a salad with too much of either oil or vinegar can destroy its appeal and nourishment, too much orientation toward either strategic or tactical processes can undermine an infrastructure. A proper balance between strategic and tactical processes can improve both the long term planning and the short term operation of an infrastructure. Understanding which processes are generally strategic and which are usually tactical also helps anticipate their necessary interactions. Two processes that are both tactical will interact differently than two processes that are strategic, and each of these pairs will interact differently from a pair that is a mixture of strategic and tactical. Knowledge of a process's orientation can also assist in selecting process owners who are more aligned with that process's orientation. Some prospective owners may have more ability in the strategic area, while others may be better suited for tactical processes.

**Identifying Strategic Processes**

There are 12 major processes commonly associated with infrastructure management. Applying typical characteristics of strategic activities such as being long range in nature, a focus of two to three years, and months to plan and deliver, to these 12 processes result in five of them being designated as strategic:

Production acceptance
Capacity planning
Strategic security
Disaster recovery
Facilities management

While all of these strategic processes have tactical aspects associated with them, the significant value of each one lies more in its strategic attributes. For example, the tactical part of production acceptance,

capacity planning, and disaster recovery involves the important activities of deploying production software, installing hardware upgrades, and restoring business operations, respectively. But analysts responsible for these critical events could not execute them successfully without a strategic focus involving thorough planning and preparation.

Similarly, strategic security and facilities management tactically monitor the logical and physical environments for unauthorized access or disturbance on a continual basis. But the overriding objective of ensuring the ongoing integrity and use of the logical and physical environments requires significant strategic thinking to plan, enforce, and execute the necessary policies and procedures.

**Identifying Tactical Processes**

We now turn our attention from strategic processes to tactical ones. Employing a method similar to what we used in the strategic area, we identify the following seven processes as being tactical in nature:

Availability
Performance and tuning
Change management
Problem management
Storage management
Network management
Configuration management

Just as the strategic processes contained tactical elements, some of the tactical processes contain strategic elements. For example, the network and storage management processes involve not only the installation of network and storage equipment, but the planning, ordering, and scheduling of such hardware as well—activities that require months of advance preparation. But the majority of activities associated with these two processes are tactical in nature, involving real-time monitoring of network and storage resources to ensure they are available and in sufficient quantity.

**The Value of Distinguishing Strategic from Tactical Processes**

There are four reasons to identifying systems management processes as either strategic or tactical in nature.

1. Some analysts by their nature are more strategically oriented while others are tactically oriented. Understanding which processes are strategically or tactically oriented can facilitate a more suitable match when selecting a process owner for a particular discipline.

2. The degree of emphasis or support an infrastructure places on specific processes can indicate an organization's orientation toward systems management processes. An infrastructure that focuses mostly on tactical processes tends to be more reactive in nature, while those focusing on strategic processes tend to be more proactive in nature.

3. Infrastructure managers typically want to assess the quality and effectiveness of the 12 processes within their organization to determine which ones need the most refinement. Knowing the orientation of the processes requiring the most improvements indicates whether the necessary improvements are tactical or strategic in nature.

4. In a world-class infrastructure each of the systems management processes integrate with one or more of the other processes for optimal effectiveness. Understanding which processes are tactical or strategic in nature assists in addressing integration issues.

**Relationships between Strategic and Tactical Processes**

As mentioned earlier, each of the 12 systems management processes integrate with, and depend on, other processes for optimal use. In fact, we are about to see that all of them interact with at least one of the other processes. Several interact with more than half of the remaining total. Some processes have no significant interaction, or relationship, with another specific process. So how do we know which processes form what type of relationships with which others?

The matrix below gives us these answers. Each of the 12 processes is listed along the top and left-hand side of the matrix and is designated as either tactical or strategic. If the combination of two tactical processes results in a significant process relationship, then the interaction of the two is designated T for tactical. If the combination of two strategic processes results in a significant process relationship, then the interaction of the two is designated S for strategic. If a significant relationship is the result of the combination of a tactical and strategic discipline, then the interaction is designated as M for mixture. If the combination of any two processes, either tactical or strategic, results in no significant interaction, then the intersecting box is blank.

| | (T) **AV** | (T) **PT** | (S) **PA** | (T) **CM** | (T) **PM** | (T) **SM** | (T) **NM** | (T) **CF** | (S) **CP** | (S) **SE** | (S) **DR** | (S) **FM** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| (T)**AV** | | | | **T** | **T** | | **T** | | | | | |
| (T)**PT** | | | | | **T** | **T** | | | **M** | | | |
| (S)**PA** | | | | **M** | **M** | | | | **S** | **S** | | |
| (T)**CM** | **T** | | **M** | | **T** | **T** | **T** | **T** | **M** | **M** | | |
| (T)**PM** | **T** | **T** | **M** | **T** | | | **T** | | | | | |
| (T)**SM** | | **T** | | **T** | | | | | **M** | | **M** | |
| (T)**NM** | **T** | **T** | | **T** | **T** | | | | **M** | **M** | | |
| (T)**CF** | | | | **T** | | | | | | | | |
| (S)**CP** | | **M** | **S** | **M** | | **M** | **M** | | | | | **S** |
| (S)**SE** | | | **S** | **M** | | | **M** | | | | | |
| (S)**DR** | | | | | | **M** | | | | | | **S** |
| (S)**FM** | | | | | | | | | **S** | | **S** | |

**Relationships of Strategic and Tactical Processes**

**Legend**

**AV –** Availability management **PM –** Problem management **CP –** Capacity planning
**PT -** Performance and tuning **SM -** Storage management **SE -** Strategic Security
**PA –** Production acceptance **NM –** Network management **DR –** Disaster recovery
**CM –** Change management **CF –** Configuration management **FM –** Facilities management

**T** - Both processes in the relationship are tactical.

**S** – Both processes in the relationship are strategic.
**M**- The relationship is a mixture of tactical and strategic processes.
**(T)**—Process is tactical in nature. **(S)**—Process is strategic in nature.

The matrix above supplies several pieces of valuable information. It represents which processes are designated as tactical and which are strategic. It shows how each process interacts (or does not interact) with others and whether that interaction is entirely tactical, strategic, or a mixture of the two. Finally, the matrix quantifies which processes have the most interaction and which ones have the least. Knowledge of these interactions leads to better managed infrastructures, and managers of well-run infrastructures understand and utilize these relationships. Just as nutritionists use the proper combination of oil and vinegar on hearty salads to improve the physical health of individuals, infrastructure managers use the proper combination of strategic and tactical processes to improve the operational health of their organizations.