Unit 4: Planning

The systems planning phase is the fundamental process of understanding why an information system should be built and determining how the project team will go about building it.Thus the planning phase can be divided into two sub-phases:

- project identification and selection, and
- project initiation and planning.

Identifying and Selecting Systems Development Projects:

Organizations prioritize projects based on factors like feasibility, potential ROI, and alignment with strategic goals. Effective project selection ensures resources are allocated to initiatives that bring the most value.

Project identification and selection consists of three primary activities:

1. **Identifying potential development projects**

   This involves recognizing areas where information systems (IS) can improve business processes, enhance efficiency, or solve specific problems. Identifying projects requires understanding organizational goals and consulting stakeholders to pinpoint needs, opportunities, and gaps that could be addressed by new systems.

2. **Classifying and ranking IS development projects**

   Once potential projects are identified, they are classified based on factors like strategic alignment, complexity, urgency, and resources needed. Ranking them involves prioritizing projects based on their expected impact, costs, benefits, and alignment with the organization's objectives to ensure optimal allocation of resources

3. **Selecting IS development projects**

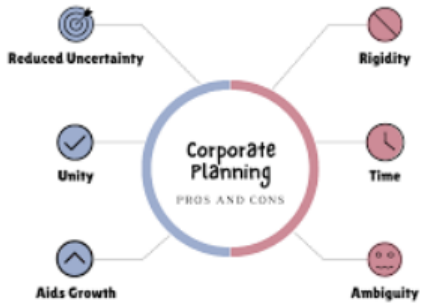
   In this final step, decision-makers evaluate the ranked projects and select those that offer the most value to the organization. This selection balances available resources, project feasibility, and long-term strategic goals, often resulting in a portfolio of projects aligned with business priorities.

Corporate and Information Systems Planning:

This covers how organizations plan their information systems in alignment with corporate objectives. Strategic planning ensures that IT initiatives support long-term business goals, improving efficiency and competitive positioning.

Corporate planning

Corporate planning is the process by which businesses create strategies for meeting business goals and achieving objectives. It involves strategy definition, strategy direction, decision-making and resource allocation.



Corporate Strategy Involves:

1. **Mission statement**

   a statement that makes it clear what business a company is in focuses on gaining an understanding of the current enterprise.

2. **Objective statements**
   A series of statements that express an organization's qualitative and quantitative goals for reaching a desired future position.

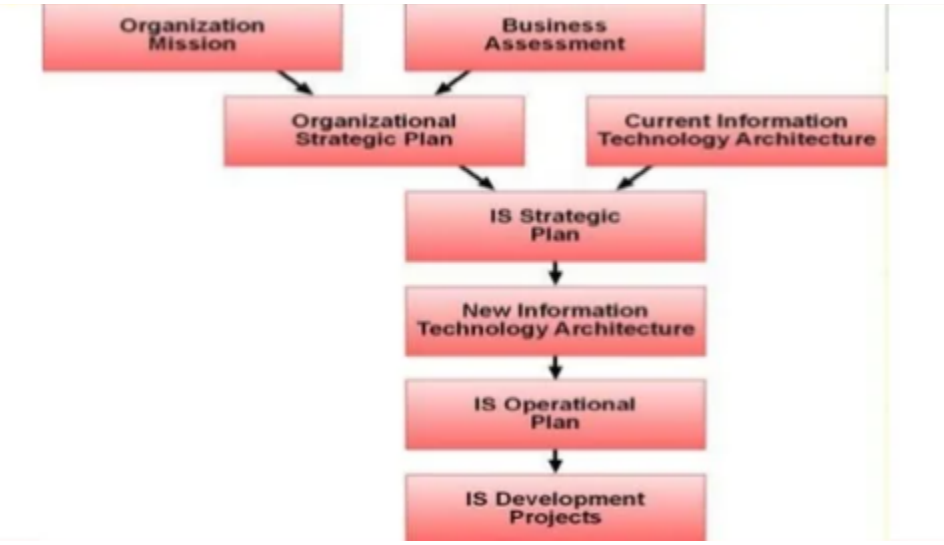
3. **Description of competitive Strategy**

   The method by which an organization attempts to achieve its mission and objectives three generic strategies, for reaching corporate objectives:

- low-cost producer
- product differentiation
- product focus or niche

Information Systems Planning:

Information systems planning (ISP) is a process of defining objectives for organizational computing and identifying suitable potential information technology (IT) applicable to the company.



1. Describe the current situation:

most widely used approach is for describing the current organizational situation is generically referred to as top-down planning.Top-down planning attempts to gain a broad understanding of the informational needs of the entire organization.The approach begins by conducting an organization's extensive mission, objectives, and strategy and analysis of the determining the information requirements needed to meet each objective.

2. Describing the target situation, trends, and constraint:

The next step in the ISP process is to define the target situation that reflects the desired future state of the organization.This means that the target situation consists of the desired state of the locations, units, functions, processes, data, and IS to create the target situation, planners must first edit their initial lists and record the desired locations, units, functions, processes, data,and information systems within the constraints and trends of the organization environment (e.g., time, resources, technological evolution, competition, and so on).

3. Developing a transition strategy and plans:

This plan should be very comprehensive, reflecting broad, long-range issues in addition to providing sufficient detail to guide all levels of management concerning what needs to be done, how,when, and by whom in the organization.

Initiating and Planning Systems Development Projects:

Once an information system (IS) project is selected, the initiation and planning phases are critical to setting a strong foundation for successful development. This process begins with the clear definition of project objectives and scope, which includes identifying the specific problems the system aims to address and the value it will bring to the organization.

1. Defining Objectives and Requirements:

The first step is to work with stakeholders—such as business managers, users, and technical teams—to clarify project goals and define requirements. This helps ensure alignment between the system's intended outcomes and the organization's needs. Objectives should be measurable and specific, as they guide every stage of the project. Requirements analysis involves gathering and documenting both functional needs (what the system should do) and non-functional requirements (such as performance, security, and usability) to ensure all critical aspects are considered from the start.

2. Establishing a Project Roadmap:

The project roadmap is a high-level plan that outlines key phases, tasks, milestones, and deadlines. It provides a timeline for development, testing, and deployment activities. This roadmap breaks down the project into manageable stages, such as requirement analysis, system design, coding, testing, and implementation, which are then used to estimate resources and timelines accurately. At this stage, project managers also identify potential risks and mitigation strategies to prevent common issues from derailing progress.

3. Resource Allocation and Team Formation:

Effective planning also includes identifying and assigning resources such as budget, personnel, and technology. Forming a capable project team is essential, with roles defined to cover areas like project management, development, testing, and user support. This ensures that each phase of the project has the necessary expertise for smooth execution.

4. Creating a Project Management Plan:

The project management plan outlines the processes, tools, and methodologies that will be used throughout the development lifecycle. This includes deciding on a development methodology (e.g., Agile, Waterfall), setting up communication protocols, and defining quality assurance procedures. A well-documented management plan ensures clear communication, tracks progress, and maintains quality standards throughout the project.

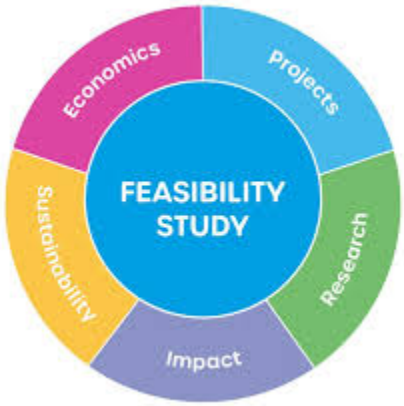
5. Defining Success Metrics and Approval:

Setting success metrics early on helps measure the project's progress and impact. Key performance indicators (KPIs) are established, covering factors like budget adherence, timeline accuracy, and user satisfaction. Additionally, obtaining formal approval from stakeholders is necessary to officially move the project from the planning stage into development.

Overall, the initiation and planning phases set a structured path forward, minimizing uncertainties and maximizing the chances of delivering a successful information system that meets organizational goals and user needs.

Project Feasibility:

Project feasibility is the process of evaluating a proposed project to determine its viability and likelihood of success. This assessment focuses on several key areas:



Technical Feasibility:

This evaluates whether the organization has the technical capabilities and resources needed to execute the project. It examines the availability of technology, expertise, and tools required to build, implement, and maintain the system. This step ensures that technical challenges can be effectively addressed.

Operational Feasibility:

Operational feasibility assesses whether the project aligns with the organization's workflow and operational structure. It considers the ease of adoption by users, compatibility with current processes, and potential improvements to efficiency. This helps determine if the system will fulfill its intended purpose and provide real value to end-users.

Financial Feasibility:

Financial feasibility analyzes the costs involved in the project, comparing them against the expected benefits. It includes budgeting for development, maintenance, and training costs, as well as evaluating the potential return on investment (ROI). This ensures that the project is financially sound and supports the organization's financial goals.

By conducting a thorough project feasibility assessment, organizations can avoid committing resources to projects that may be unachievable, impractical, or unlikely to deliver sufficient benefits. This early evaluation minimizes risk and guides the organization toward projects with a strong

Building and Reviewing the Baseline Project Plan:

The baseline project plan (BPP) is a comprehensive document that establishes a clear outline for executing and monitoring a project. It includes detailed descriptions of tasks, resources, timelines, and key milestones. The purpose of the BPP is to create a structured guide that serves as the foundation for project execution and allows the project team to measure progress against predefined goals. Here's a closer look at the components and purpose of the BPP:

Defining Tasks and Milestones:

The BPP begins by breaking down the project into individual tasks and organizing them into logical sequences. Each task is associated with specific milestones and deliverables to keep the project on track. These tasks are detailed in terms of what needs to be accomplished, who is responsible, and any dependencies they may have on other tasks.

Allocating Resources:

Resource planning is a key element of the BPP. This includes assigning the required personnel, tools, technology, and budget to each task. Clear resource allocation helps avoid bottlenecks, ensures that each part of the project has adequate support, and allows the team to manage workloads effectively.

Establishing Timelines and Deadlines:

The BPP sets realistic timelines for each task and phase of the project, based on the project's scope and complexity. Deadlines and milestones are established to provide a roadmap for the entire project lifecycle. This timeline serves as a guide for scheduling and also provides visibility into any potential delays, helping the team to proactively address them.

Setting a Reference for Progress Tracking:

As the baseline, the BPP acts as a standard against which actual progress is measured throughout the project. Regularly comparing the current state with the baseline plan helps identify deviations early, making it easier to implement corrective actions and stay aligned with the overall goals.

Reviewing and Finalizing the Plan:

Once the baseline project plan is drafted, it is reviewed by key stakeholders to ensure accuracy, completeness, and alignment with organizational goals. This review process may involve refining tasks, adjusting timelines, or reallocating resources based on feedback. Final approval from stakeholders makes the BPP an official reference document for the project.

The baseline project plan is an essential tool for structured project management, providing a reference point that supports accountability, performance tracking, and effective decision-making. It enables the project team to manage changes and ensure the project stays within scope, budget, and schedule.