

Information Systems Strategy and IT Governance ITC4212

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IS Strategy Planning

Reference:

Anita Cassidy, A Practical Guide to Information Systems Strategic Planning, Second Edition, 2006

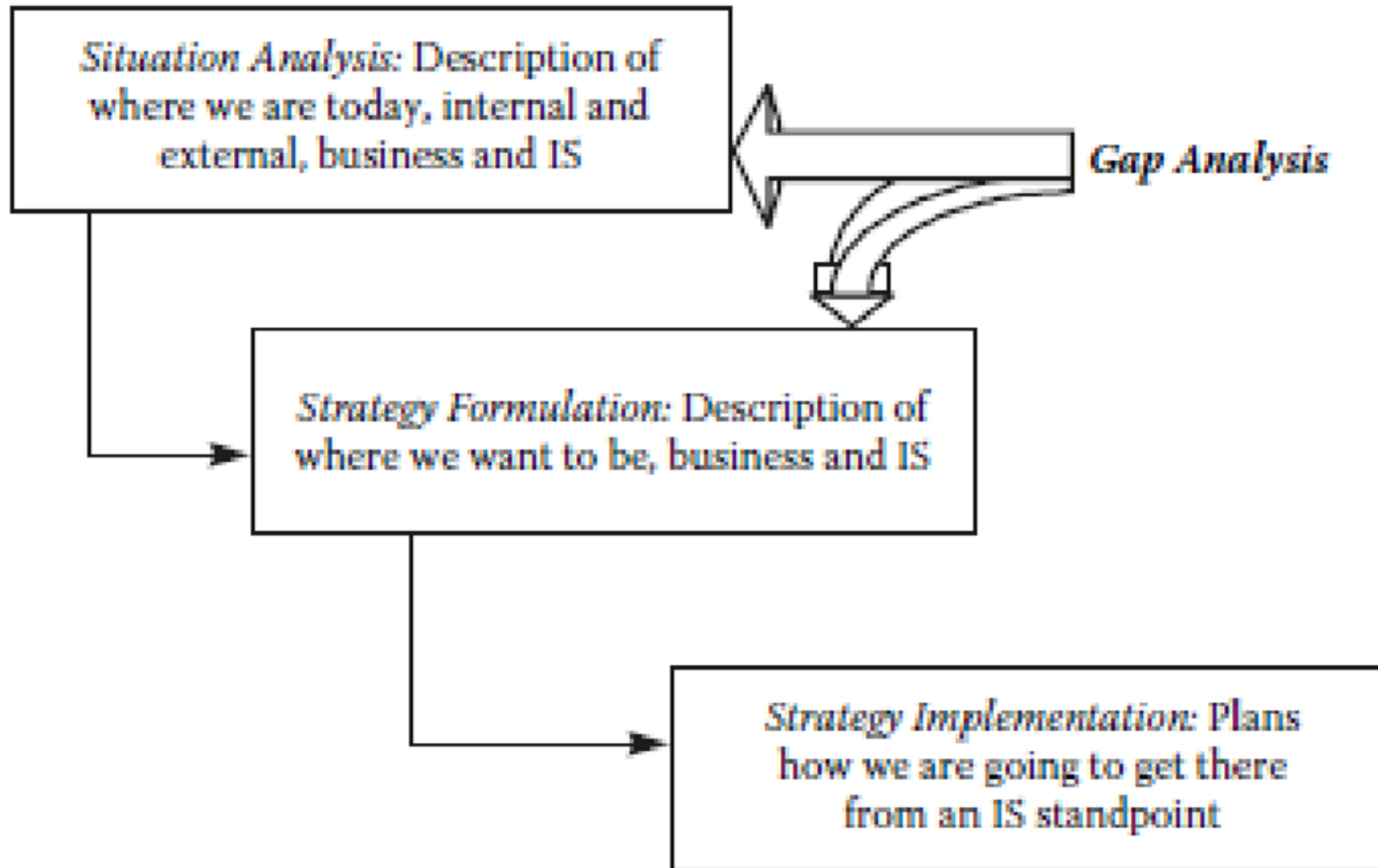
Content

IS Strategy Planning

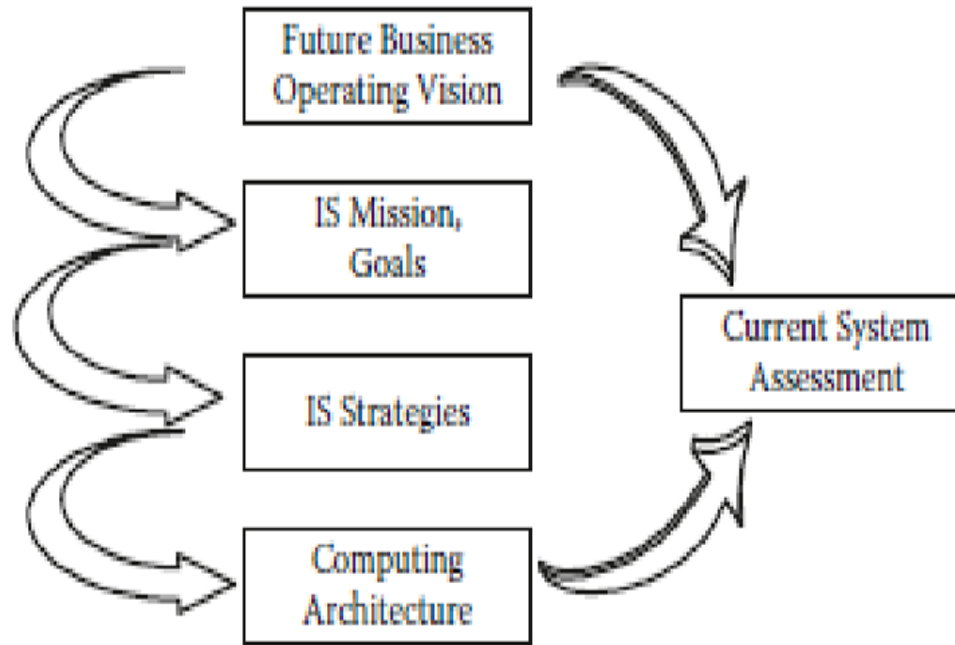
- Planning components
- Plan development
- Planning process

Planning Components

Situation analysis
Strategy formulation
Strategy implementation

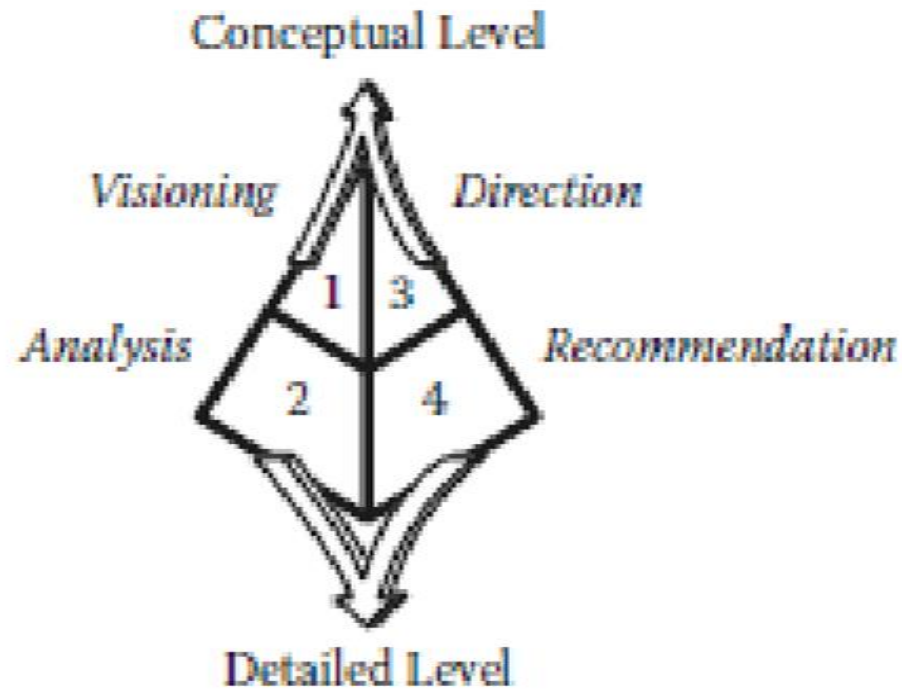


Plan Development



- The **plan begins with understanding the future business operating vision.** The business operating vision becomes the basis for the IS mission, objectives, strategies, and technical computing architecture.
- Assess the current systems by comparing the systems to the future business operating vision and the desired IS computing architecture, as depicted in the Figure.

Planning Process



Phases of the planning process

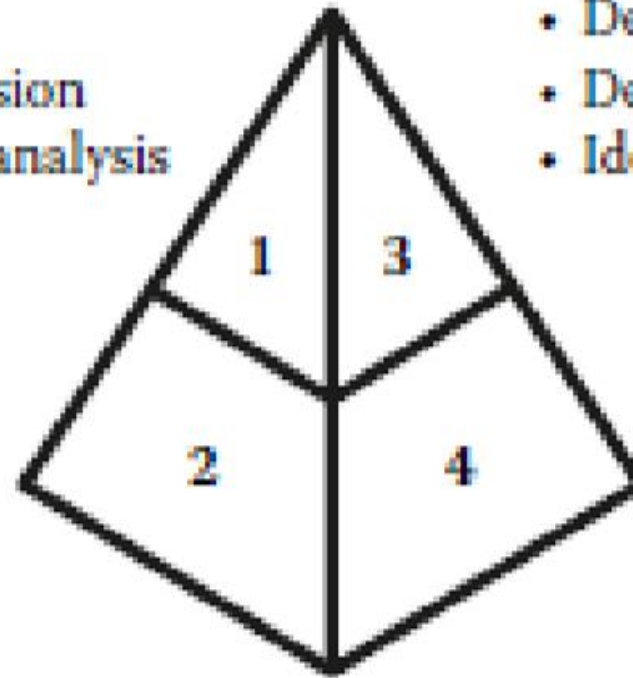
Phases of the Planning Process

Visioning Phase

- Initiate and manage the project
- Understand business situation and vision
- Document and confirm the business analysis

Analysis Phase

- Understand current IS situation
- Analyze current IS situation
- Develop recommendations, solution alternatives



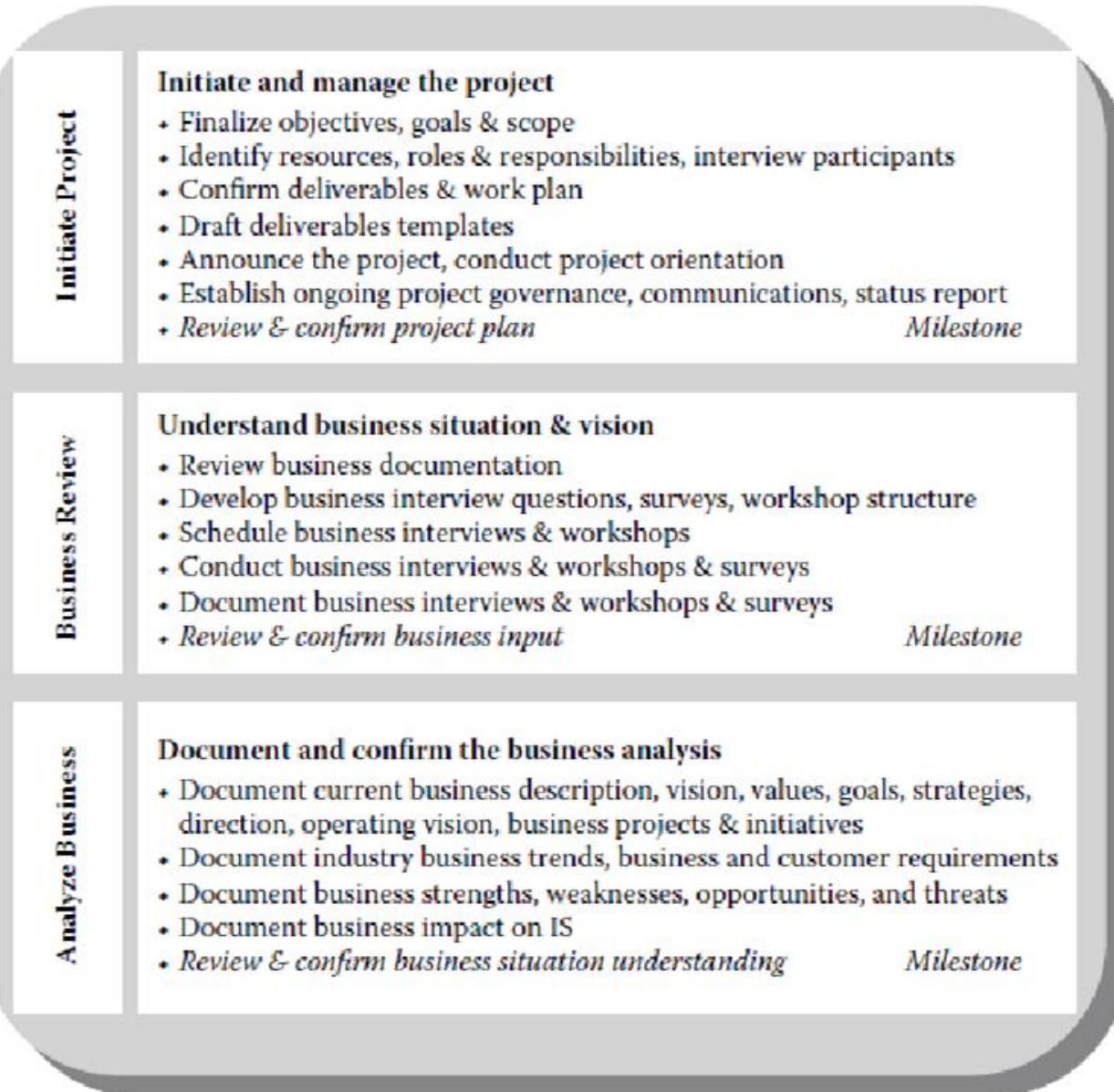
Direction Phase

- Develop IS vision and direction
- Develop IS plan
- Identify IS projects

Recommendation Phase

- Develop roadmap
- Develop business case
- Communicate the plan

Visioning Phase



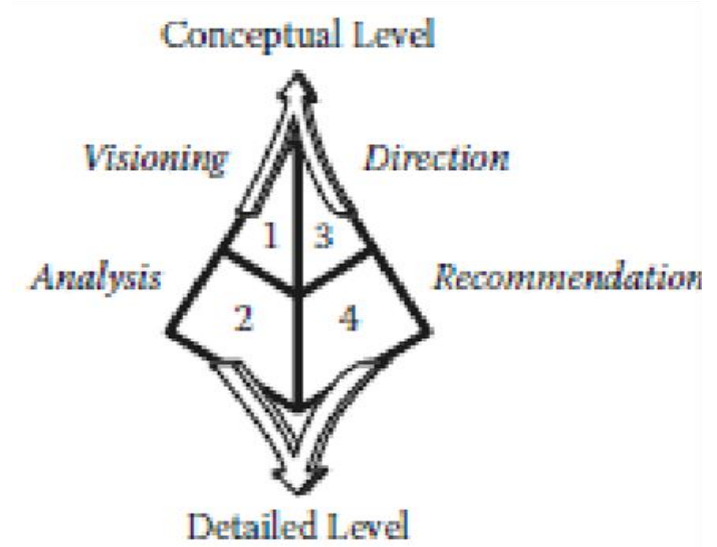
- Purpose, Process, & Scope
- Project Participants
- Deliverable Table of Contents & Structure
- Project Announcement
- Status Report Structure



- Business Interview & Survey Questions
- Detailed Interview & Workshop Notes & Survey Results

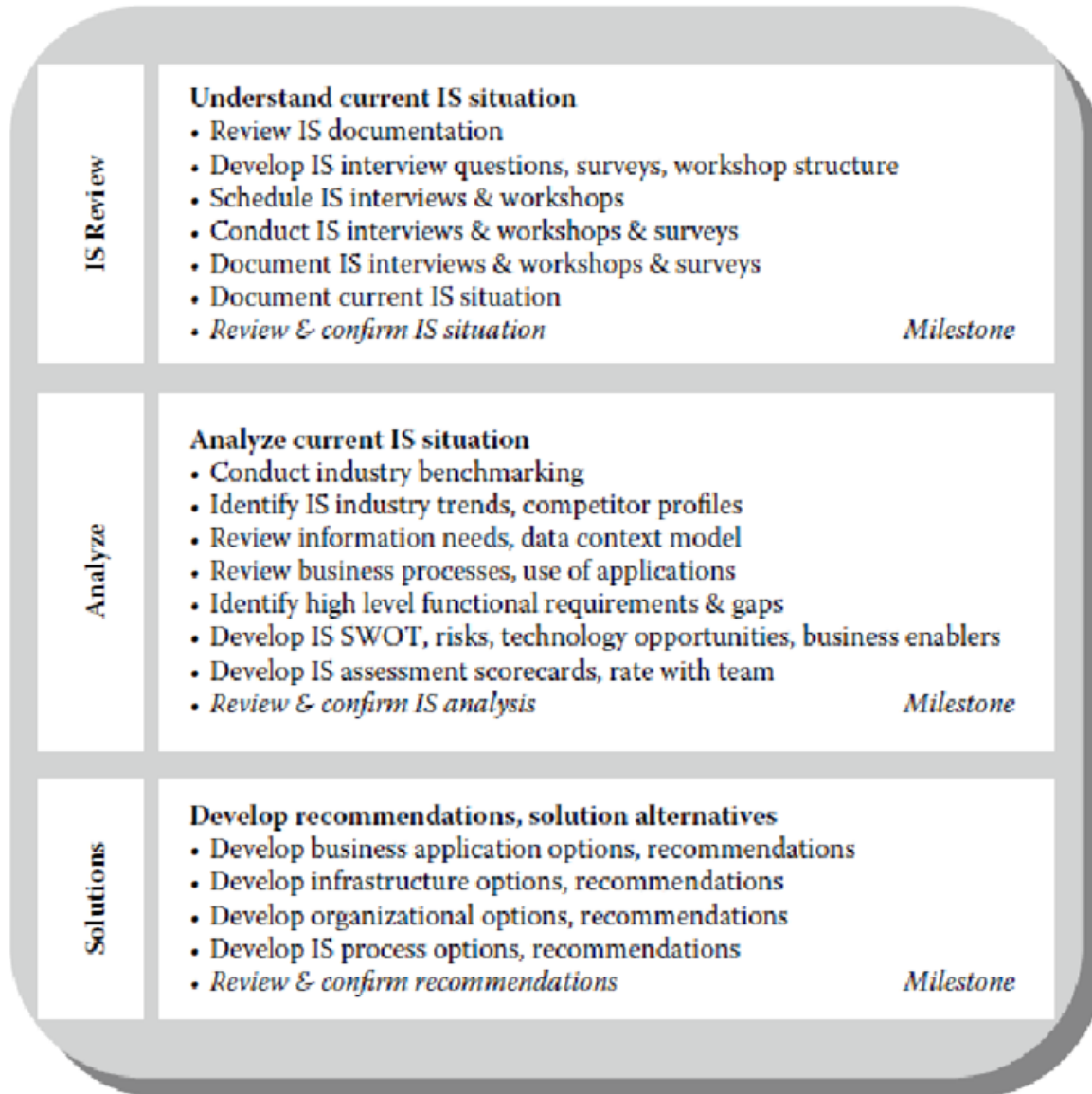


- Business Information
- Business Direction
- Business Operating Vision
- Business Requirements
- Key Measures
- Process Improvements
- Business SWOT Analysis
- IS Implications



In the first phase, **visioning, establish and initiate the planning project and process.** Treat the IS planning effort like any other project by developing project plan, schedule, tasks, and deliverables.

Analysis Phase



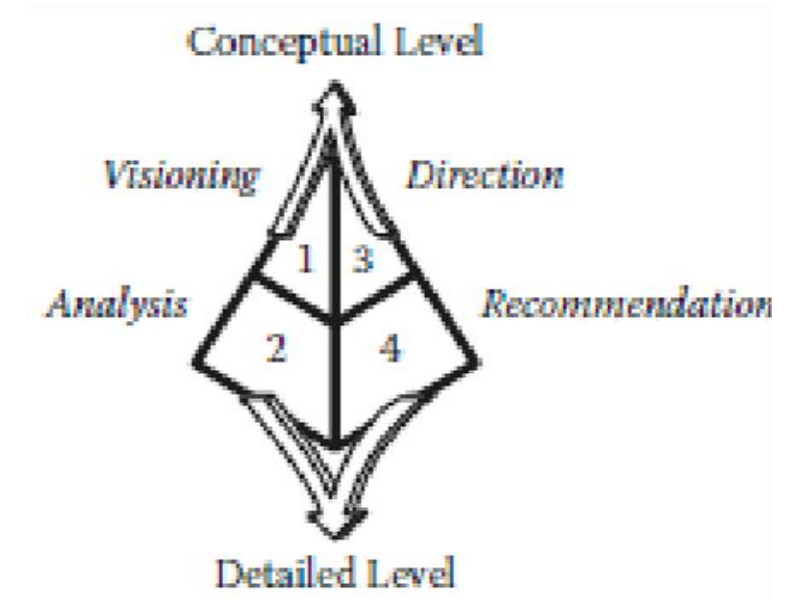
- IS Interview & Survey Questions
- Detailed IS Interview & Workshop Notes
- Current IS Situation



- Survey Results
- Key Information Needs
- Key Functional Requirements & Gaps
- Business Process Improvements
- IS Industry Statistics, Trends & Profiles
- IS SWOT
- IS Assessment Scorecards



- Recommendations (Business Application, Infrastructure, Organizational, Process)



In the second phase, analysis, thoroughly document and objectively **analyze the IS environment**.

It is often **enlightening to communicate the IS situation to executive management**.

Direction Phase

IS Vision	Develop IS vision and direction <ul style="list-style-type: none">• Develop IS vision, mission• Develop IS goals, strategies• Determine IS balanced scorecard, metrics• <i>Review & confirm IS vision and direction</i> <i>Milestone</i>
IS Plan	Develop IS plan <ul style="list-style-type: none">• Develop business application direction• Develop e-business direction• Develop technical infrastructure direction• Develop organizational direction• Develop IS process direction• Develop prioritization process• <i>Review & confirm IS plan</i> <i>Milestone</i>
IS Projects	Identify IS projects <ul style="list-style-type: none">• Identify IS projects (business applications, infrastructure, organization, & process)• Estimate IS costs• Identify business benefits• Prioritize IS projects• <i>Review & confirm IS projects & prioritization</i> <i>Milestone</i>



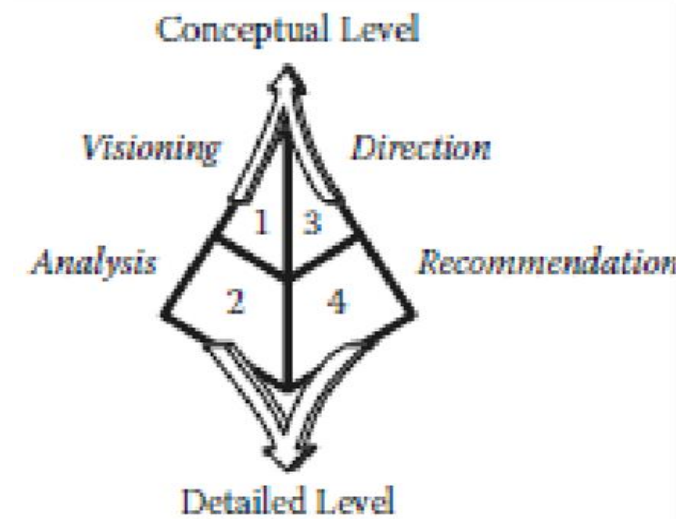
- IS Vision, Mission
- IS Goals, Strategies
- IS Balanced Scorecard, Metrics



- Business Applications, E-Business Direction
- Technical Infrastructure Direction
- Organization Plan
- Process Plan
- Prioritization Process



- Prioritized IS Projects
- Costs
- Business Benefits



It is in the direction phase where **the mission and vision for IS is expressed using the business situation and direction as a basis.**

Formulate the strategic objectives that are necessary to assist the business in achieving its objectives.

Recommendation Phase

Roadmap	Develop roadmap <ul style="list-style-type: none">• Document detailed roadmap• Summarize costs• Summarize organizational impact• Identify risks, concerns, risk mitigation, readiness assessment• <i>Review & confirm roadmap</i> <i>Milestone</i>
Business Case	Develop business case <ul style="list-style-type: none">• Summarize business benefits, business case for action• Develop communication plan, presentation summary• Develop on-going planning process, steering committee• <i>Review & confirm business case</i> <i>Milestone</i>
Communication	Communicate the plan <ul style="list-style-type: none">• Finalize detailed plan document• Develop summary presentation• <i>Present plan, discuss</i> <i>Milestone</i>



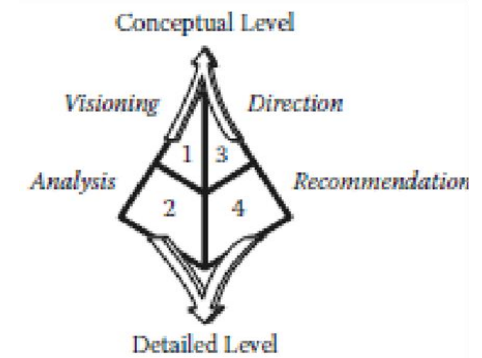
- IS Roadmap
- Investment Proposal
- Organizational Impact
- Risk Assessment
- Readiness Assessment



- Business Case
- Self-Funding Financial Model
- Communication Plan
- Planning Process



- Executive Summary
- Final Plan Document
- Summary Presentation
- Project Completion and Review Survey



In this phase, **document the detailed roadmap outlining projects for the next several years**. Summarize the costs, time, and resources required.

Benchmark data will be helpful to validate estimates. If there are multiple options, identify the various options, as well as the advantages and disadvantages of each option.

- At the end of the planning process we need to have;
 - A **well-documented IS strategic plan**
 - A **business and IS situation that is understood by the entire organization**
 - A direction supported throughout the organization

Plan contents sample

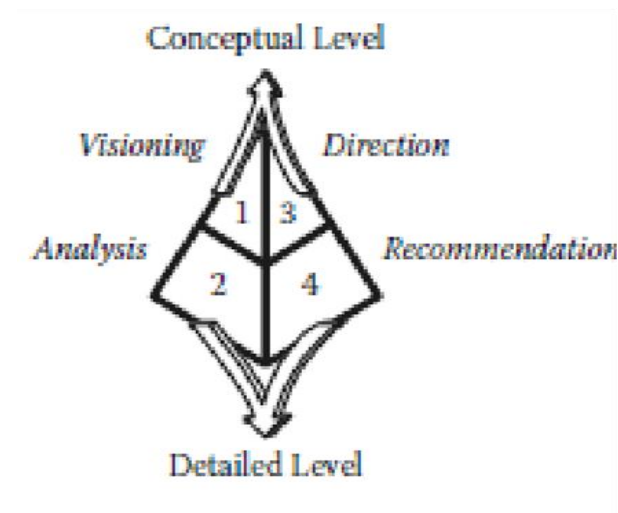
- Figure depicts an example of an outline of the contents of a completed strategic plan document.
- Modify the plan document and process to fit the situation and requirements.
- Create a detailed document as well as a summary presentation while proceeding through the planning phases.

Plan Contents Sample

- **Executive Summary**
- **Current Business Situation**
 - Information
 - Direction
 - Operating Vision
 - SWOT Analysis
- **Business/IS Link**
 - IS Implications
 - Key Business Measures
 - Key Business Requirements
 - Business Process Improvements
- **Current IS Situation**
 - Business Application
 - Technical Infrastructure
 - Organization
 - Processes
 - Budget
- **IS Industry**
 - IS Industry Trends
 - Manufacturing Industry
 - Benchmark Statistics
 - Competitive Profiles
- **IS Assessment**
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
 - Scorecard
 - Survey Results
 - Recommendations
- **IS High Level Direction**
 - Vision
 - Mission
 - Goals
 - Strategies
 - Scorecard, Metrics
 - E-business Direction
 - Prioritization Process
- **IS Direction**
 - Business Application
 - Technical Infrastructure
 - Organization
 - Processes
- **Implementation Plan**
 - Projects
 - Roadmap
 - Costs, Investment
 - Organizational Impact
 - Business Case, Financial Funding Model
 - Next Steps
 - Communication Plan
 - Planning Process
- **Appendix**

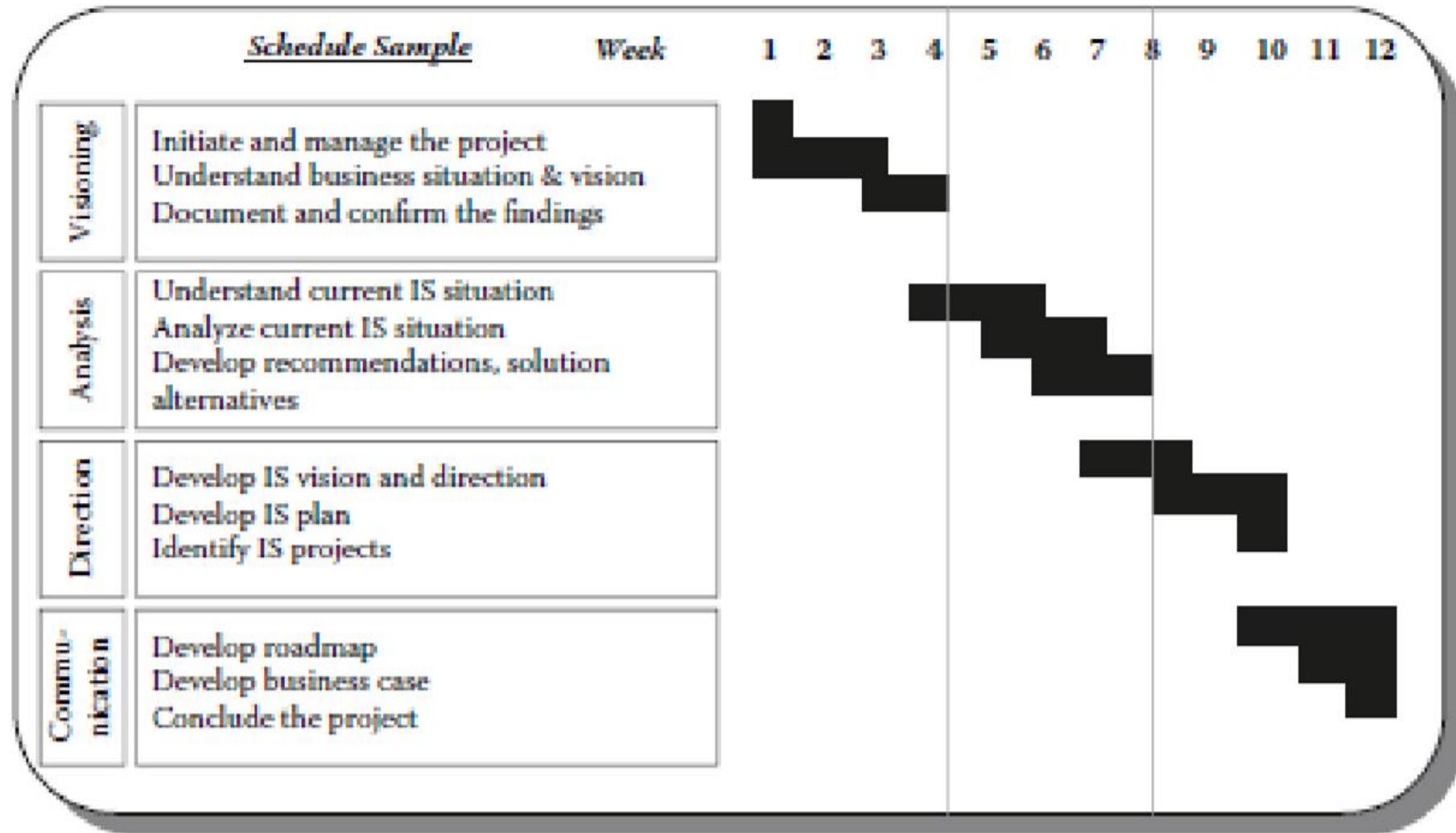
Plan contents by phase

Figure shows the sample table of contents and identifies at which phase each section is completed



<u>Table of Contents</u>			
Phase 1: Visioning	2. Current Business Situation <ul style="list-style-type: none">• Information• Direction• Operating Vision• SWOT Analysis 3. Business/IS Link <ul style="list-style-type: none">• IS Implications• Key Business Measures• Key Business Requirements• Business Process Improvements	Phase 3: Direction	7. IS High Level Direction <ul style="list-style-type: none">• Vision• Mission• Goals• Strategies• Scorecard, Metrics• E-business Direction• Prioritization Process 8. IS Direction <ul style="list-style-type: none">• Business Application• Technical Infrastructure• Organization• Processes
	4. Current IS Situation <ul style="list-style-type: none">• Business Application• Technical Infrastructure• Organization• Processes• Budget 5. IS Industry <ul style="list-style-type: none">• IS Industry Trends• Manufacturing Industry• Benchmark Statistics• Competitive Profiles 6. IS Assessment <ul style="list-style-type: none">• Strengths• Weaknesses• Opportunities• Threats• Scorecard• Survey Results• Recommendations	Phase 4: Recommendation	9. Implementation Plan <ul style="list-style-type: none">• Projects• Roadmap• Costs, Investment• Organizational Impact• Business Case, Financial Funding Model• Next Steps• Communication Plan• Planning Process 10. Appendix 1. Executive Summary

Schedule sample



Summary

- Identify the planning process and steps you will use to complete the plan. Tailor the planning process so that it meets the needs of the organization and the purpose for completing the strategic plan.
- Give strategic planning the proper priority and attention so that it is completed in a timely fashion.
- Obtain involvement from the organization throughout the planning process.
- **Communicate, communicate, communicate.**

Q&A

Questions
Answers

THANK
YOU