

Strategic Planning Guide

How to create a one-page strategic plan that **CIOs and IT Executives** will actually use

Storytelling takes strategy from idea to action

Fit organizations — those that perform well in any market condition — distinguish themselves in part because they are great at creating, articulating and executing strategy in a way that maximizes results.

For companies that excel, the payoff is higher revenue and greater net income for the enterprise. But it takes a dynamic approach to strategy, where leaders adapt to changes in the marketplace, customer preferences and the enterprise's competitive position.

Too many organizations instead talk of strategy in terms of the document they are creating — documents that are rarely used.

Storytelling captures the adaptive nature of great strategy and helps organizations quickly determine priorities and investments. From a one-page story to a one-page strategic plan, the narrative evolves from idea to action.

Are your strategy documents **WORN?**

Written

Once

Read

Never



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VP Analyst, Gartner

Create your one-page IT strategy story

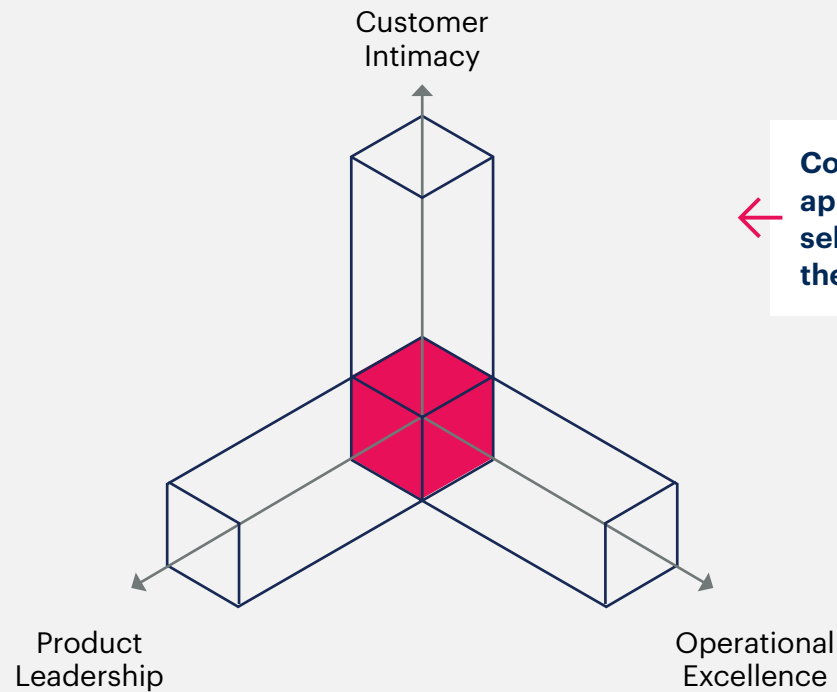
- 1 Know how you succeed
- 2 Understand your differentiators
- 3 Choose a viewpoint
- 4 Draw a picture



1 Understand how your organization succeeds

Ask: Do we as an executive team know how our enterprise achieves success?

Treacy and Wiersema Model for Strategic Differentiation

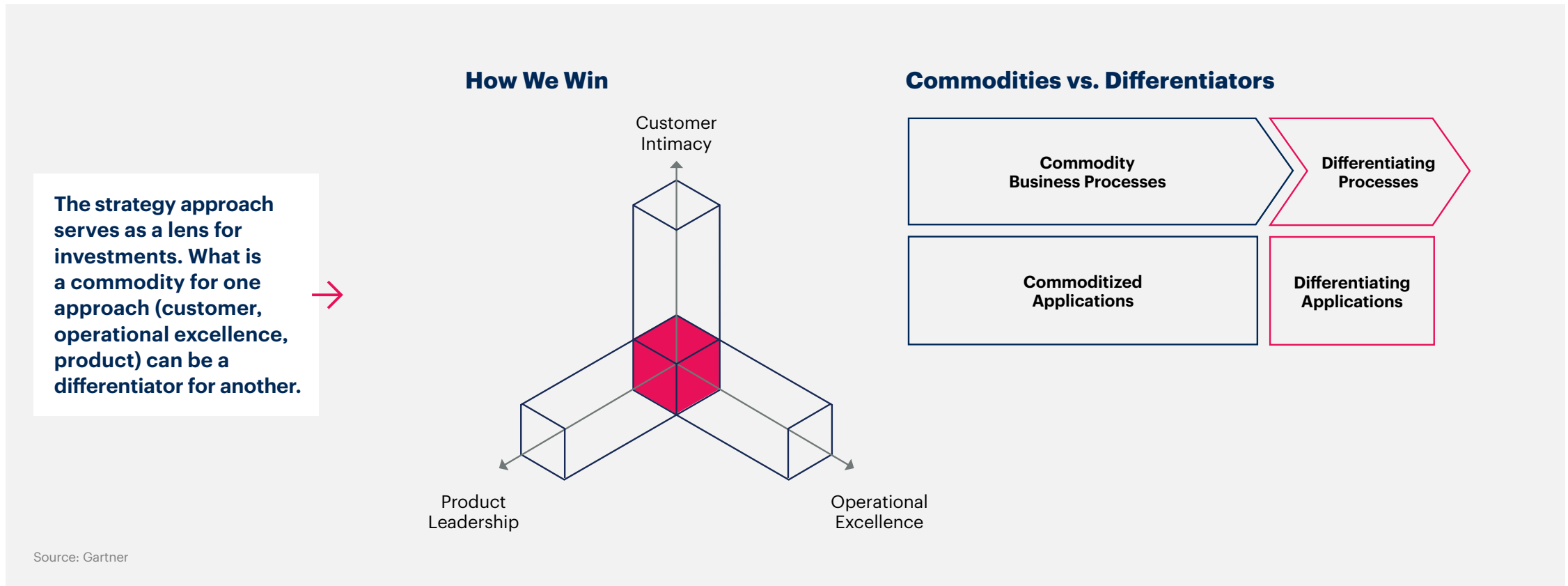


← Companies that focus on one of these strategic approaches make more money than those that select two or more approaches to winning in the marketplace.

Source: Gartner

2 Use that strategy as a lens for delivering the story

Ask: Do we as an executive team understand what differentiates the enterprise?



3 Develop a rich story by selecting a viewpoint and exploring the perspective

Viewpoint

Stakeholder view

What would that stakeholder group say about our company?

Process view

What end-to-end issues exist with the current process?
What works well? What does a “perfect” process look like?
How do we know all this?

Capabilities view

What capabilities does the enterprise need to be more competitive (win) in the marketplace? What capabilities does IT need?

Answer a question (or two) in story form

Examples

Customers: “Every time I call in, I’m on hold forever.”

Executives: “How can we determine our strengths if we don’t know our revenue and profits by products?”

Customer Service: “It takes me 10 minutes to boot up my system every morning.”

Distribution: “Do we have enough product to meet our daily forecast?”

Examples

- Minimal process handoffs
- Decisions made in a single step
- Customers served as close to “immediately” as possible

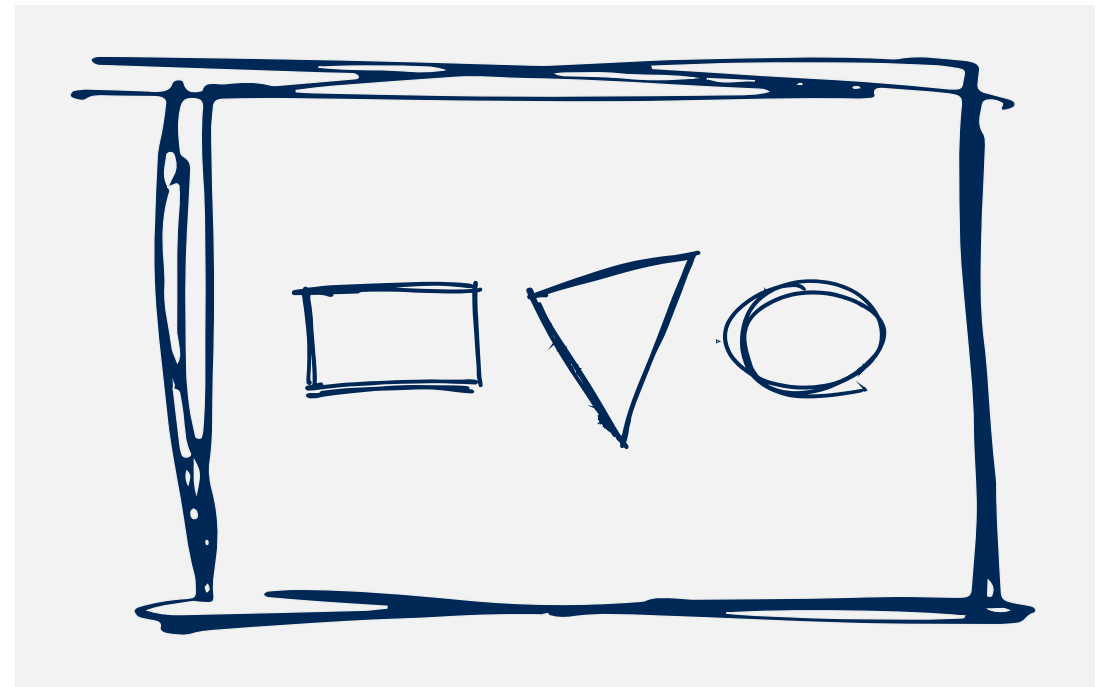
Example

The ability to cross-sell products and services and the ability to launch new products monthly

4 Draw a picture using these tips and techniques

Resist the urge to build a strategic plan before you have created your strategy story.

- The “art” lies in an iterative process.
- Most people are better editors than creators: Resist the urge to make your draft “perfect.”
- Listen to the mantras used and stories and metaphors told by your business peers — those will lead you toward a viewpoint and a picture.
- Use this picture as a starter for every conversation about strategy, every change that has taken place and every success to date.
- There are stories and storylines. This is a story — use it as part of the storyline you want to tell.



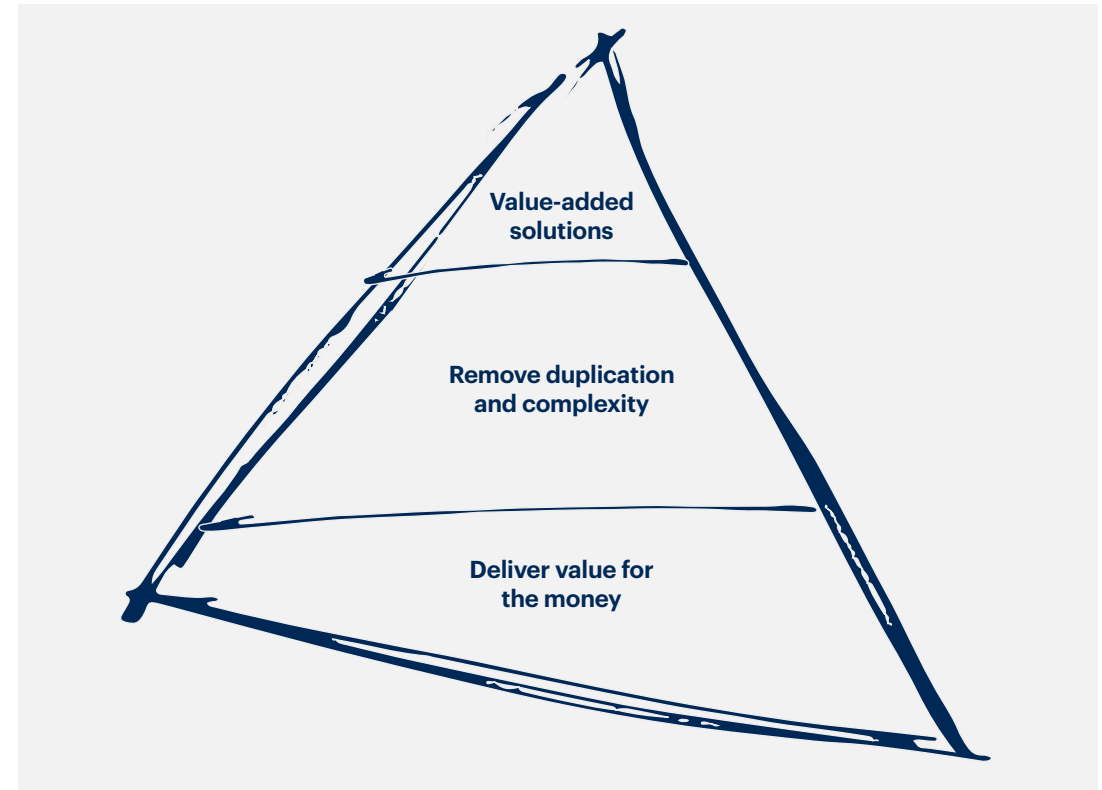
Example: Think this strategy picture is too simple?

Work on a pictorial approach to storytelling.

This is the pictorial story of how an IT services company plans to move from delivering value for money to providing value-added solutions to customers:

- The foundation is service and cost.
- For IT to deliver value for both the business and the IT function itself, it must remove duplication and complexity.
- The top layer is where IT contributes to growing the business — by creating and delivering value-added solutions.

Storytelling like this offers a simple way for CIOs and their teams to determine which IT strategies and tactics will best execute the enterprise strategy and deliver the expected business value.







The strategic plan's three foundational elements

Three foundational elements of any strategic plan:








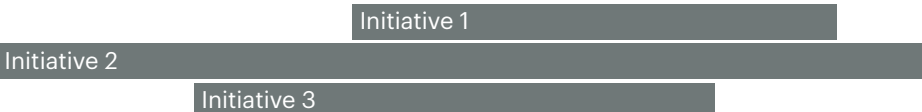

1 Business objectives

2 Business capabilities expected to drive business outcomes. In practice, one capability is likely to drive more than one business objective.








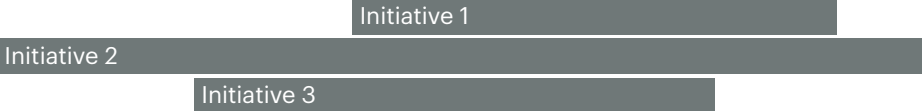

3 Key performance indicators (KPIs) used to gauge whether you are delivering on the outcomes

Business Objectives	Business/IT Capabilities	Metrics/KPIs			
 Profitable growth	Changes required for key capabilities 1-1 (list here)	Metric/KPI 1 Metric/KPI 2	Metric/KPI 3 Metric/KPI 4	Metric/KPI 5 Metric/KPI 6	Metric/KPI 7 Metric/KPI 8
 Operational excellence	Changes required for key capabilities 2-1 (list here)	Other key components: 4. Enabling capabilities and initiatives 5. Roadmap for deploying those enabling initiatives 6. Tracker of cross-enterprise dependencies and risks			
 Customer experience	Changes required for key capabilities 3-1 (list here)				
 Compliance excellence	Changes required for key capabilities 4-1 (list here)				

IT Strategic Plan for XYZ Co.





Business Objectives		Business/IT Capabilities		Strategic Actions		Strategic Roadmap			
						3Q20##	4Q20##	1Q20##	2Q20##
 Profitable growth	Changes required for key capabilities 1-1 (list here)	IT Strategic Action 1.1	IT Strategic Action 1.2						
 Operational excellence	Changes required for key capabilities 2-1 (list here)	IT Strategic Action 2.1	IT Strategic Action 2.2						
 Customer experience	Changes required for key capabilities 3-1 (list here)	IT Strategic Action 3.1	IT Strategic Action 3.2						
 Compliance excellence	Changes required for key capabilities 4-1 (list here)	IT Strategic Action 4.1	IT Strategic Action 4.2						
Enabling Changes and Initiatives									
Foundational Architecture or Operating Model Change (list here)									
Key Dependencies and Risks						Metrics/KPIs			
Dependency or Risk 1	Dependency or Risk 3	Dependency or Risk 5	Dependency or Risk 7	Metric/KPI 1	Metric/KPI 3	Metric/KPI 5	Metric/KPI 7		
Dependency or Risk 1	Dependency or Risk 4	Dependency or Risk 6	Dependency or Risk 8	Metric/KPI 2	Metric/KPI 4	Metric/KPI 6	Metric/KPI 8		

IT Strategic Plan for Sample Co.

Business Objectives	Business/IT Capabilities	Strategic Actions	Strategic Roadmap			
			3Q20##	4Q20##	1Q20##	2Q20##
 Profitable growth	Digital channel management	(APIs) to support channel integration				
 Operational excellence	Optimized warehouse operations (order fulfillment)	Increase warehouse automation with robotic process automation (RPA)				
 Customer experience	Data-driven customer engagement	Build a scalable, cloud-based customer data platform				
 Compliance excellence	Compliance management (e.g., GDPR)	Update data controls and process management				
Enabling Changes and Initiatives						
<ul style="list-style-type: none"> Transition to a product-centric delivery model Identify and run a pilot for product-centric delivery 		<ul style="list-style-type: none"> Increase cloud-based infrastructure capacity Update to latest version of ERP 				
Key Dependencies and Risks			Metrics/KPIs			
<ul style="list-style-type: none"> Channel sales capability changes (marketing) Warehouse optimization (supply chain) Data classification coding (corporate risk) 		<ul style="list-style-type: none"> Customer data initiatives (e.g., sales and finance) Product-centric delivery (across multiple functions) 	<ul style="list-style-type: none"> Year-over-year growth in channel sales orders Decrease backorder fulfillment time Increase click-through rate on product recommendations 		<ul style="list-style-type: none"> Year-over-year decline in number of compliance issues Decrease cost per user of ERP 	

Actionable, objective insight

Explore these additional complimentary resources and tools for IT Leaders:

<p>Tool </p> <p>Gartner Digital Execution Scorecard™</p> <p>Unite the C-suite and board to achieve your digital priorities.</p> <p>Get Started</p>	<p>Webinar </p> <p>Impactful Storytelling: Proven Techniques to Craft Influential Messages</p> <p>Deliver your strategic plan in the most impactful way possible.</p> <p>Watch Now</p>	<p>Webinar </p> <p>The Art of the 1-Page Strategy: Storytelling Enables Business Growth</p> <p>Use storytelling to accelerate business growth and drive digital.</p> <p>Watch Now</p>	<p>Research </p> <p>Top Strategic Technology Trends</p> <p>Explore trends that will accelerate digital capabilities and drive growth.</p> <p>Learn More</p>
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