



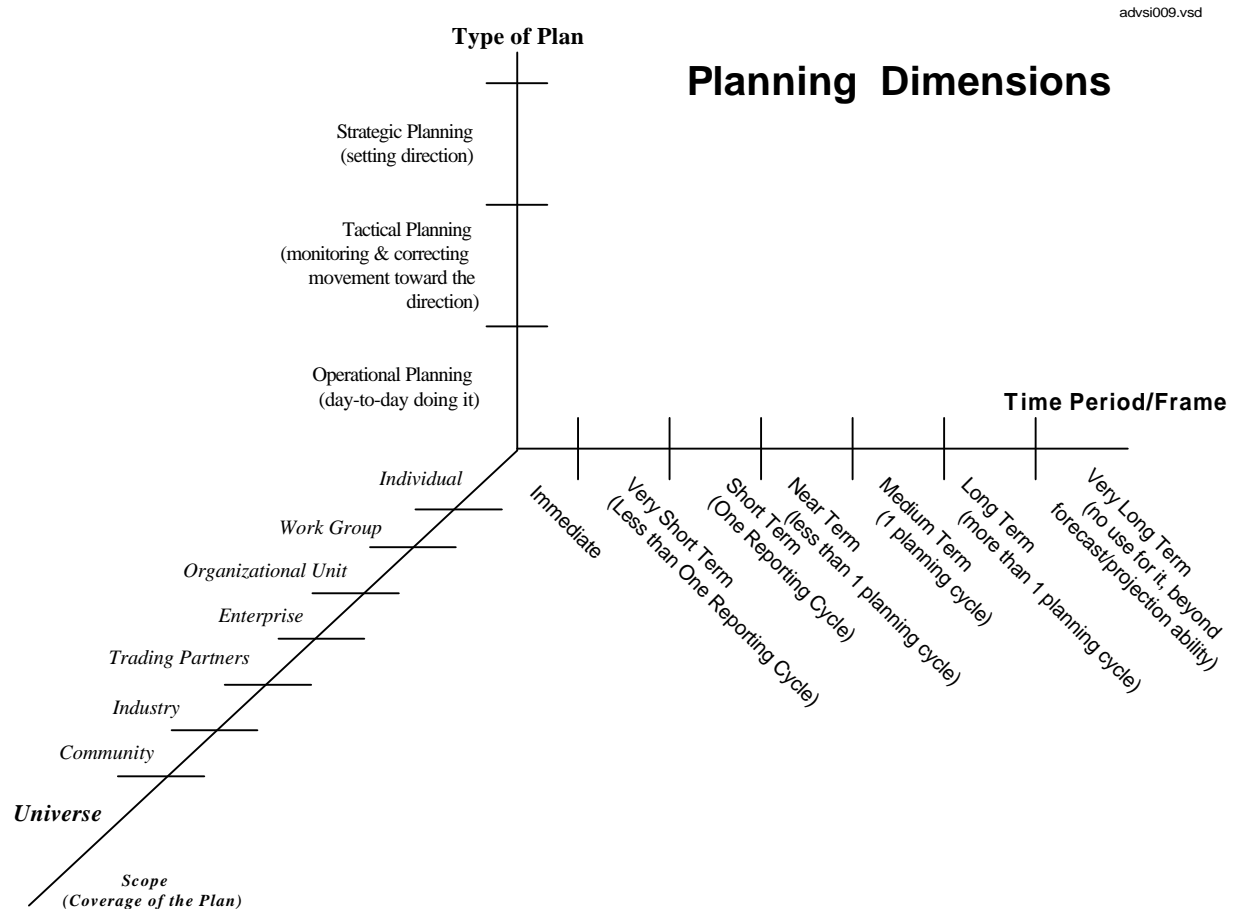
Planning Business Strategy

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Advanced Strategies has been involved in Strategic Planning for a number of companies and associations through the years. This article will provide a very brief overview of Advanced Strategies' methodology for Strategic Planning and how it has helped some of our clients.

"If you fail to plan, you plan to fail." Who of us hasn't heard that? Our culture has hammered into us all the necessity for planning, but beyond that, we often don't know exactly what it involves. Maybe we don't even know that there are different types of planning, each encompassing different objectives, needs, activities, etc. Here we want to address one type of plan, the strategic plan, that an organization may undertake, and we will discuss how to carry it out.

Since there is often confusion between long term planning (a plan for multiple planning cycles) and strategic planning, Advanced Strategies uses a three-dimensional graph (Figure 1) to illustrate and differentiate the various dimensions of planning: the type of plan, the time period (or time frame), and the universe within which the plan is to function.



Using this model, we first must determine what type of plan is of interest to the client at a given time. There are three types of plan: the strategic plan, the tactical plan, and the operational plan. The strategic plan answers the question, "Where are we going?" and sets direction for an entity (for example, we want

to cross a sea.) The tactical plan monitors and corrects movement toward the direction we want to go. This tells us what to do to maintain the course in the face of obstacles and opportunities. (If our boat encounters an iceberg, we must change course to avoid hitting it.) Finally, the operational plan is the day-to-day implementation of the plan (we row the boat to the west and switch rowers every hour).

The time frame for planning may be anytime from the immediate—today or tomorrow—to any point in the future. Business entities may synchronize their strategic planning with some identified planning cycle or with their financial reporting cycle. The “universe” includes those individuals or groups who are identified as having some degree of interest in the organization’s direction.

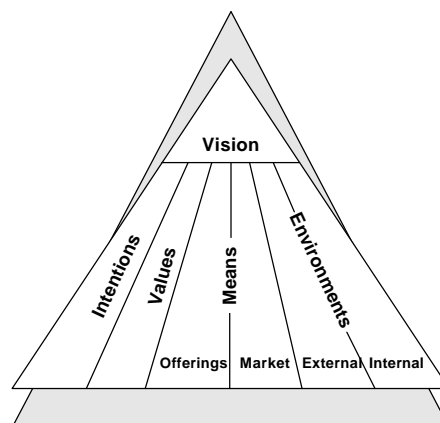
Once the type of plan, the time frame, and the universe are determined, the members of the organization are introduced to a planning model that we call the “Business Strategy Model.” (Figure 2, page 2) This model helps to answer the question of organizational direction. An enterprise exists to obtain a set of *Intentions* while being governed by a set of *Values* via a set of *Means* while operating in an *External Environment* and capitalizing on its *Internal Environment*. To understand this model, it is essential to define and understand its components.

Intentions are what we plan to accomplish. They are the purposes or reasons that the enterprise exists, including the results that are expected from the operation of the enterprise. *Values* comprise the set of beliefs that govern the ways intentions are to be reached; they determine how we plan to do what we do. *Means (or Products)* are the target products and services identified to achieve the enterprise’s intentions; they are what we do to achieve our intentions. *Environments* state how we will operate both internally and externally to achieve our intentions. The external environment includes the conditions and forces that affect an enterprise’s strategic options, while the internal environment is the infrastructure and organizational structure of the enterprise. All of these components together constitute the organization’s *Vision*, the unifying statement that ties all of the aspects together as a whole. It defines what an enterprise is and what it is striving to become.

In order to assist clients in strategic planning, Advanced Strategies normally utilizes a Joint Development Approach (JDASM) session, based on the business strategy model we’ve discussed, to define an organization’s vision rapidly. This approach is tailored for each event and is designed to meet the client’s specific business objectives, given the emotional and intellectual needs of the group. The organization’s vision is defined in a facilitated group session that is structured to bring all of the participants to consensus.

The use of these models and the JDASM process effectively build the strategic plan and the vision statement that define where the enterprise currently is and what it is striving to become. And once these are determined, the organization can develop its transformation plan to implement them.

Business Strategy Model





Advanced Strategies, Inc.

Several years ago, Advanced Strategies was asked by the Information Users Association (IUA) to assist in the development of its strategic plan. IUA is a professional organization, established in the late 1970's, and is one of the most well known and organized user associations in the USA. We met with them and, based on the models described above, helped them to create their strategic plan. They review it annually and revise it based on any changes in their organization's environment. They maintain their plan according to the business strategy model, and they follow their plan.

Another organization, the Centers for Disease Control and Prevention in Atlanta, has utilized these principles via Advanced Strategies' training course, Strategic Planning. This five-day course details the principles we've discussed here and more, and then tailors them, by means of a customized case study, for the client organization's particular environment. The information systems professionals at CDC tell us this course has given them a jump start on their planning and has set them off in the right direction. Their upcoming JDA session will be the beginning of the real challenge!