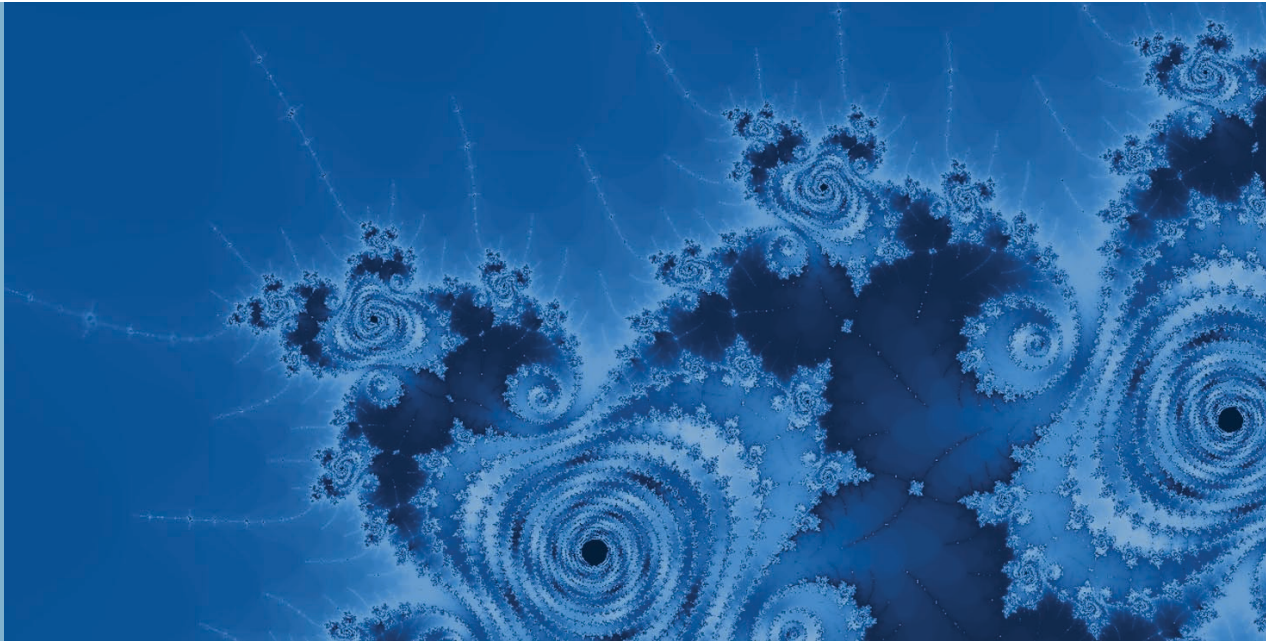


# Strategic Planning



## Key Initiative Overview

## David Aron Research Vice President

This overview provides a high-level description of the Strategic Planning Key Initiative. IT leaders can use it to create strategies that help the business win, and change the value potential of the IT organization and the perceptions of IT held by the rest of the business.



## Analysis

Strategic planning is the process of translating the enterprise's vision and mission into how resources, including IT's capabilities, are deployed to generate maximum value for stakeholders.

IT strategy helps guide the business strategy based on IT capabilities and opportunities, and determines IT's contribution to delivering on the business strategy. A great IT strategy focuses on how IT will help the business achieve its goals, and includes three sections. The demand section clarifies the business context—how the business will win, what business capabilities are needed and IT's contribution to that success. The control section outlines how decisions will be made and how behaviors will be monitored to align with demand. The supply section details the services that will be provided, and the enterprise architecture migration to support the business capabilities, the IT human capital development to meet business needs, and the strategic approach to sourcing.

### Consider these factors to determine your readiness

The discipline of strategic planning focuses on developing strategies to help the business win. Consider these points before beginning a strategic planning discipline initiative:

- First, determine how the IT organization should clarify the purpose and scope of the IT strategy in light of the business's vision, mission and value proposition.
- Clarify the demand side. What will make the business win? What business capabilities are needed, and how will IT contribute?
- Consider how to plan for uncertainty, and the degree and types of flexibility that could potentially be required.
- Determine how best to create a group-level strategy, including how you will address and engage the similar and differing needs of the enterprise and all business units.

### Conduct your strategic planning initiative in six phases

Gartner recommends that IT leaders follow six major phases in their strategic planning discipline initiatives. These phases may vary, depending on the organization and the extent of the planning initiative:

- **Strategize and plan:** Develop the change, tactical and communications plans for creating your IT strategy and plan. Set the scope, and establish resources, budget and governance systems. Integrate your IT strategic planning with other planning, budgeting and change initiatives.
- **Assess current state:** Assess the enterprise's history, best practices, competencies and approach to strategic planning. Identify and seek feedback from key stakeholders and related roles about the current state—what works and what does not. Identify risks.
- **Assess competencies:** Use feedback from key stakeholders and from external sources of advice to develop best practices for the discipline. Identify competencies that are necessary to carry out the discipline.
- **Gain approval:** Draft an implementation proposal for your strategic planning process. Seek feedback and buy-in from stakeholders and related roles. Revise based on feedback from stakeholders, and present the final strategic planning process to senior leaders for approval.
- **Implement:** Staff and manage the implementation of the discipline. Seek feedback from users. Monitor risks.
- **Operate and evolve:** Use governance systems to track progress and success with strategic planning. Adjust the discipline approach based on operational results and changing business needs.

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## Read More From Gartner About Strategic Planning

The following is just a sampling of the research and tools Gartner clients have access to every day.

### Strategize and plan

#### **Principles and Options for Choosing the Location and Role of an IT Organization**

ID: G00168467

The choice of the correct location and role for an IT organization involves several complex factors and is made more difficult by evolving changes in the strategic value of IT. The correct answer depends on all these issues and on the style and goals of the enterprise.

#### **Gartner IT Strategy Template; CIO Desk Reference Chapter 7**

ID: G00171962

A concise IT strategy document is a key success factor and an indicator of a well-run IT organization. This template presents suggested sections, content and format for a world-class IT strategy document. It is applicable to both private and public sector organizations.

#### **The Business Unit's IT Strategy**

ID: G00166400

A great IT strategy should be brief, complete and clearly connected to business success. A business unit IT strategy must also balance the imperative to drive business unit success with the need to integrate with enterprisewide IT strategy.

### Assess current state

#### **Capability Assessment Tool for 'IT Strategy: A CIO Success Kit'**

ID: G00168354

This interactive tool enables IT and business leaders to evaluate the effectiveness of their IT strategy as an integral part of the business strategy.

#### **Eyeing a Return to Growth, CIOs and Business Leaders Plan for Change in People, Profiles and Practices**

ID: G00167135

Even amid economic turmoil, CIOs, business leaders and HR leaders can see changes on the horizon that will demand a unified approach to the quest for talent, the professional profile, work behaviors and human capital management.

#### **It's Time to Prepare for a Return to Business Growth**

ID: G00167574

In October 2007, we said to prepare for a recession. Now we're saying it's time to prepare for a return to business growth.

### Assess competencies

#### **Toolkit: My Hype Cycle, 2009**

ID: G00170497

The "My Hype Cycle, 2009" Toolkit enables you to access and download a repository of more than 1,600 technologies from Gartner's Hype Cycle Special Report. You can search, filter and prioritize based on the detailed information for each technology, as well as create your own custom Hype Cycle.

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### **Most Valuable Technologies: Survey Results for Emerging-Technology Adoption and Management**

ID: G00171624

Gartner surveys show that high-value technologies include broad collaboration tools, such as enterprise instant messaging and desktop videoconferencing, as well as less-adopted, niche technologies, such as 3D printers, mobile robots and radio frequency identification.

### **IT and Business Performance Goals for Cost Optimization**

ID: G00167392

Cost optimization is a significant campaign like any other IT initiative. IT leaders should document the quantifiable outcome of their endeavors to monitor progress and prove success.

## Gain approval

### **Getting Into the Heads of the Executive Leadership Team: What They Want From the CIO When They Join the Executive Table**

ID: G00165761

At a recent round-table discussion, Gartner analysts met to explore executive team roles to gain a greater understanding of the perspectives of the various members, including the board and C-level executives, to discuss their areas of focus and what they think and expect of IT.

### **Aligning With the Business Unit CEO**

ID: G00171081

The management temperature check is a way to develop a common language with the business unit CEO and other key stakeholders. Use it to identify and align with their perspectives.

### **Why You Need to Strengthen Business Alignment and Engagement Now**

ID: G00170632

Aligning IT with the business and engaging the right people are perennial challenges for IT leaders. This collection of research will help you understand the new dimensions of this issue, and how to align with business units to achieve mutually positive outcomes.

## Implement

### **Creating an Enterprise IT Strategy When Business Units Are Very Diverse**

ID: G00166482

Creating a strategy that supports the needs of multiple BUs is one of the most challenging activities an IT organization must execute. It requires the ability to address the unique needs of a business, while still driving the optimal level of synergies across the enterprise.

### **A Day in the Life of a CIO, 2028**

ID: G00160930

This report is part of a set of research exploring three different roles in the year 2028. We introduce Dawn, a 58-year-old business unit CIO working for a large global conglomerate, which consists of banking, communications and social community facilitation.

### **IT and the Art of Enterprise Planning; CIO Desk Reference Chapter 4**

ID: G00171903

The objective of an integrated business and IT planning process is to put a road map in place that will ensure that the IT organization's business plans and strategy influence the direction of the business and IT.

## Operate and evolve

### **Introducing Pattern-Based Strategy™**

ID: G00168553

The environment after the recession means business leaders must be more proactive in seeking patterns from conventional and unconventional sources that can positively or negatively impact strategy or operations, and set up a consistent and repeatable response by adjusting business patterns.

### **Balancing Growth, Innovation, Cost and Risk in a Turbulent Environment**

ID: G00170160

As organizations prepare for return to growth, they need a balanced set of capabilities to outperform the competition. But balance is only good for a day, and competitors are always changing the rules. Organizations must continually revisit strategies for managing growth, innovation, cost and risk.

### **Using Social Network Analysis to Inform a Pattern-Based Strategy**

ID: G00172019

This research explains how enterprises can use social network analysis to uncover and leverage business intelligence about inter-organizational and external group dynamics in support of a Pattern-Based Strategy.

## Strategic Insights on Key Initiatives

All your initiatives are important, but some are mission-critical. Key Initiatives organize the vast Gartner resources around the projects and programs at the top of your list, helping you achieve demonstrable business results efficiently and cost-effectively.

Our 650 analysts engage in 260,000 one-to-one interactions each year with 60,000 clients from 10,000 organizations worldwide. Every day, clients tell us what they do to support their key decisions and processes for the initiatives that matter most to them. We apply that knowledge to deliver targeted insight and valuable tools just in time, from strategic planning through implementation and benefits realization. Our solutions evolve with our clients' changing needs, but our commitment to quality never changes.

Key Initiatives address significant business opportunities and threats, and typically have defined objectives, substantial financial implications, and high organizational visibility. They can involve multiple projects, but are typically implemented by a designated team with clear roles and responsibilities, and defined performance objectives. It's our solemn mission to guide your key decisions and processes so you achieve the highest possible returns at the lowest possible risk.

So which initiatives will make or break you this year? Don't worry, we've got you covered.

## Key Initiatives

Application Development

Application Governance

Application Integration

Application Overhaul

BPM Technology and Tools

Business Continuity Management

Business Intelligence

Competency Center

Business Process Program Management

Cloud Computing

Compliance

Corporate Performance Management

CRM

Customer Experience Management

Data Center Modernization and Consolidation

Data Management and Integration Maturity

Enterprise Architecture Program

Enterprise Architecture Stakeholder Engagement

Enterprise Social Software

ERP

Identity and Access Management

Information Governance

Infrastructure Application and Data Protection

Information Security Program Management

IT Cost Optimization

IT Governance

ITIL and Process Improvement

IT Risk Management

Master Data Management

Microsoft Windows 7 and Office

Mobile Enterprise Strategy

Negotiating Vendor Contracts

Outsourcing

PMO

Portal Strategy

SharePoint for ECM

SOA and Application Architecture

Strategic Planning

Supply Chain Management

Vendor Management

Virtualization

VoIP, Unified Communications and Collaboration

### Three ways to learn more about how Gartner can help you move your Key Initiatives forward:

- Contact your account executive.
- Attend a webinar: [gartner.com/webinars](http://gartner.com/webinars).
- View additional resources: [gartner.com/planning](http://gartner.com/planning).