

SELF-DIAGNOSTIC: IT STRATEGIC PLANNING EFFECTIVENESS

IT Strategy Development

1 ESTABLISH PROCESS GUIDELINES

- We align business-IT planning calendars.
- We establish objectives and rules for the planning process and engage BU IT heads in preplanning dialogue.
- We define key decisions and decision makers.

Effectiveness				
1	2	3	4	5

2 DETERMINE INTERNAL AND EXTERNAL CONTEXT

- We go beyond top-down articulations of business strategy and scan company, industry, and technology intelligence.
- We document assumptions about the business environment.

Effectiveness				
1	2	3	4	5

3 ASSESS IT IMPLICATIONS OF BUSINESS STRATEGY

- We cascade corporate and BU objectives into IT goals.
- We determine the impact of business strategy on the current and future IT portfolio of capabilities and applications.

Effectiveness				
1	2	3	4	5

4 FORMULATE AND CONFIRM IT STRATEGY

- We prioritize IT initiatives based on business strategy and current IT capabilities.
- We present IT strategic goals to business partners to confirm IT's strategic response.

Effectiveness				
1	2	3	4	5

5 SYNCHRONIZE BU AND FUNCTIONAL IT STRATEGY

- We clearly communicate IT strategy and its underlying assumptions to the IT executive team.
- We provide guidance on BU IT plans and tools to capture BU considerations in the central IT strategic plan.

Effectiveness				
1	2	3	4	5

14 MONITOR AND ADAPT IT STRATEGY

- We measure and report progress toward IT strategic goals.
- We monitor key trends underlying our plan assumptions to adapt IT strategy as business conditions change.

Effectiveness				
1	2	3	4	5

This self-diagnostic identifies 14 process steps for IT strategic planning. Select the value (1-5) that best describes your IT organization's effectiveness at each of the 14 steps. The overall score will help you assess your IT strategic planning maturity.

Scoring Scale	Evaluation Key	
5 = Very Effective	Total Score	Planning Maturity
4 = Effective	51-70	Advanced
3 = Moderate	31-50	Proficient
2 = Not Very Effective	14-30	Emerging
1 = Ineffective		

6 PLAN AND PRIORITIZE IT PORTFOLIO

- We maintain standardized prioritization criteria to ensure projects are aligned with strategic business and IT priorities.

Effectiveness				
1	2	3	4	5

13 COMMUNICATE IT STRATEGY BROADLY

- We customize IT strategy communication by stakeholders' engagement levels and role in execution.
- We engineer ongoing, two-way interactions to build personal connections to IT strategy.

Effectiveness				
1	2	3	4	5

7 REVISE IT ROADMAPS

- We maintain a rationalized, multi-year roadmap that clearly links technology choices to strategic priorities.
- We define business and technology event triggers that require IT to revisit the roadmap and make adjustments.

Effectiveness				
1	2	3	4	5

12 PUBLISH THE FINAL STRATEGIC PLAN DOCUMENT

- We create a clear and concise IT strategic plan that isolates strategic issues, establishes a future state, assigns ownership for those objectives, and documents success metrics.

Effectiveness				
1	2	3	4	5

11 ESTABLISH SUCCESS METRICS AND REVIEW PROCESSES

- We define business-focused IT performance and success metrics.
- We define review triggers to diagnose intercycle problems with the IT strategy.

Effectiveness				
1	2	3	4	5

10 DEVELOP THE BUDGET

- We disaggregate IT spending by cost drivers and strategic objectives to improve budget visibility for senior executives.

Effectiveness				
1	2	3	4	5

9 DEVELOP AND INTEGRATE AN ANNUAL IT OPERATIONAL PLAN

- We integrate prioritized initiatives, staffing and sourcing plans, and architecture roadmaps into an IT operational plan to guide the day-to-day implementation of strategic decisions.

Effectiveness				
1	2	3	4	5

8 ASSESS SKILLS AND ORGANIZATIONAL STRUCTURE

- We define key roles and competencies required to execute IT strategy.
- We optimize sourcing strategies and redesign organizational structure for strategy execution.

Effectiveness				
1	2	3	4	5

IT Strategy Execution

Further Assistance with IT Strategic Planning

- A Handbook for Effective IT Strategic Planning (Volume I/ Volume II)**
Improve the critical "three Cs" of IT strategic planning—Context, Creativity, and Cascade—using practical, proven tactics from leading strategy practitioners.
- IT Strategic Plan Template**
Use this customizable PowerPoint deck to reduce time and effort required to create a plan.
- IT Strategic Planning Process Map**
Use this process map to guide your IT strategic planning process.
- Strategic Planning Topic Center**
Access tools, tactics, presentations, and templates to help define, communicate, and execute IT strategy.
- IT Budget Benchmarks**
Benchmark your IT spending and staffing levels against data collected from more than 180 IT organizations.
- Strategic Planning Engagements**
Initiate a strategic planning engagement with our executive advisors to get their help in crafting an IT strategic plan.

Contact us to learn more:



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