

Strategic Planning in a Complex Environment:

Keeping Your Strategic Plans “in ACTION”

CBODN Annual Conference

April 29, 2011

Topics

- ▶ Strategic Planning Process
- ▶ Tools and Techniques for Keeping Strategic Plans “in Action”
- ▶ Forum to Discuss Collective Experiences

Presenters

- ▶ Gino Magnifico, *CIO, Army Contracting Command*
- ▶ Ruth Scogna Wagner, *Strategic Planning, Suntiva Executive Consulting*
- ▶ Brian Brennan, *Project Scheduling, Preferred Systems Solutions*
- ▶ Marisa Sanchez, *Change Management, Suntiva Executive Consulting*

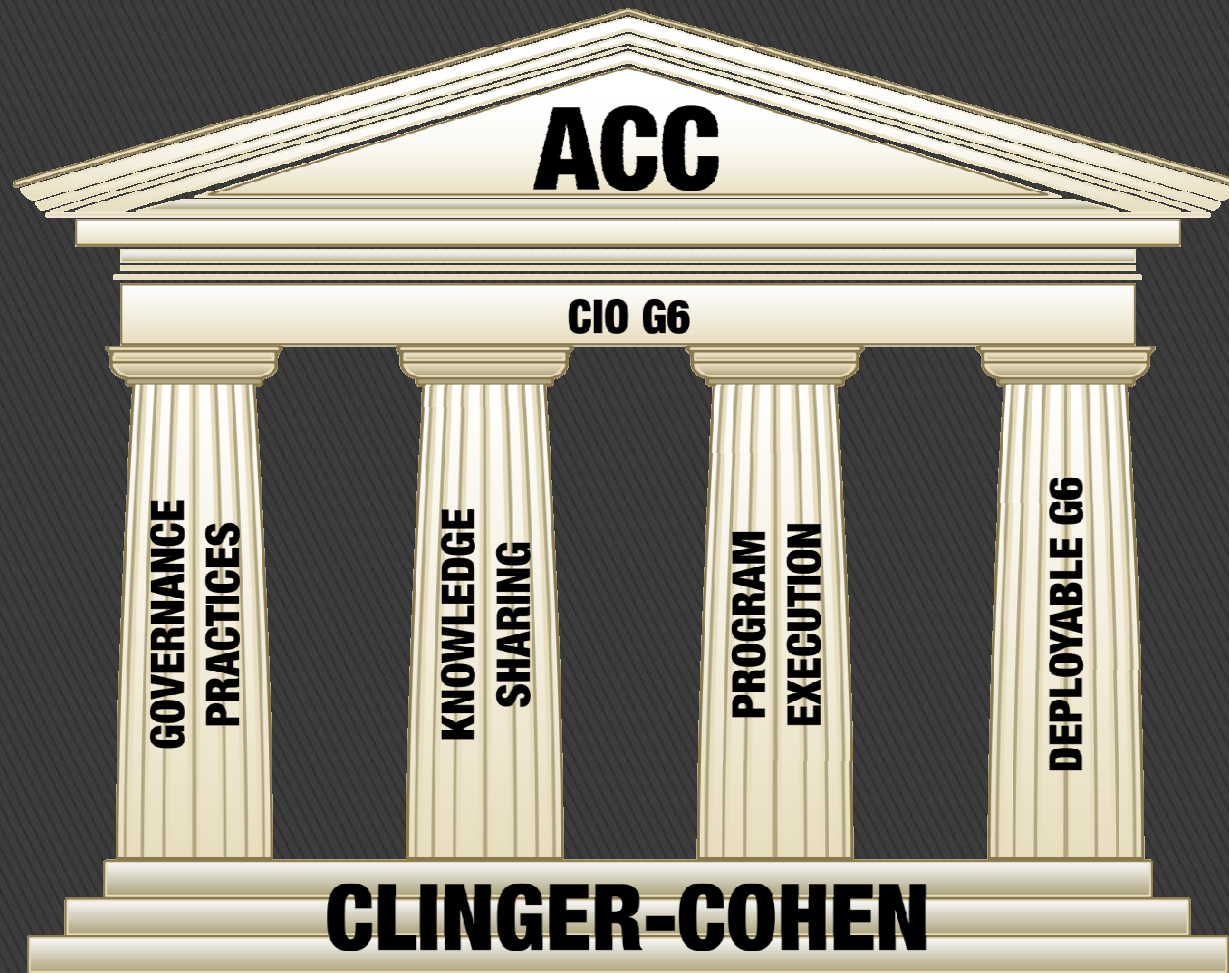
ACC Startup Requires Strategic Plan

- ▶ ACC stood up in 2008
- ▶ Strategic Plan
 - Support standup and growth of the OCIO functions
 - Guide for OCIO activity in first 12–18 months
 - Relocation to Huntsville, AL

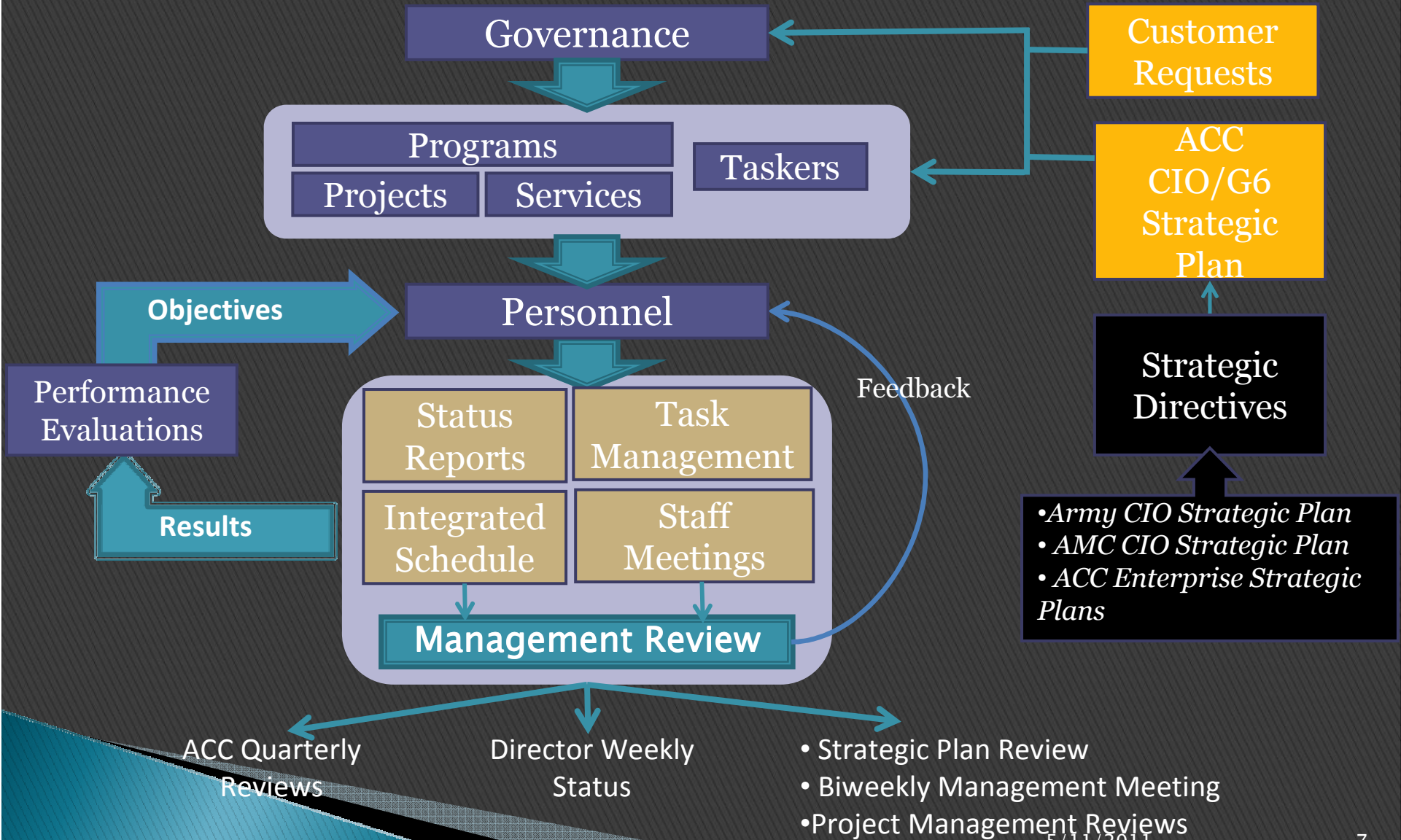
ACC Mission

- ▶ Army Contracting Command provides contracting services to provide all necessary goods and services for the Army Warfighter
- ▶ Supports 66% of all Army contracts; \$97.2 B in 2010
- ▶ HQ; two subordinate commands
- ▶ Chief Information Officer provides technology solutions for the ACC to provide contracting services

Pillars of Strategic Plan



Operating Model



Strategic Planning Process

It began simply enough – ACC OCIO needed a strategic plan:

- **The time is “right,” we could not have done six months ago**
- **“Transition to “Full Operational Capability)”**
 - **Understand the external environment**
 - **Need to engage others**
 - **Take a 12 –18 month perspective**
 - **Optimize organizational structure**
- **Strategic Plan due by August 31, 2009**

Strategic Planning Process

- ▶ Preparation:
 - Interviewed leadership team, staff, and key stakeholders
 - Prepared to feed back data to create a shared sense of the “As Is”
 - Reviewed seminal reports that impacted ACC OCIO
 - Gansler Commission Report –resulted in the creation of ACC
 - Clinger–Cohen Act of 1996 – stipulated CIO’s role and responsibilities
 - Researched relevant strategic plans
 - Army CIO
 - AMC CIO – parent command
 - ACC strategy
- ▶ Scheduled a series of off–sites with the leadership team
 - Designed a series of off–sites as key elements in the strategic planning process in order to foster communication and sharing
 - Key challenge was to create a shared sense of the “As Is”

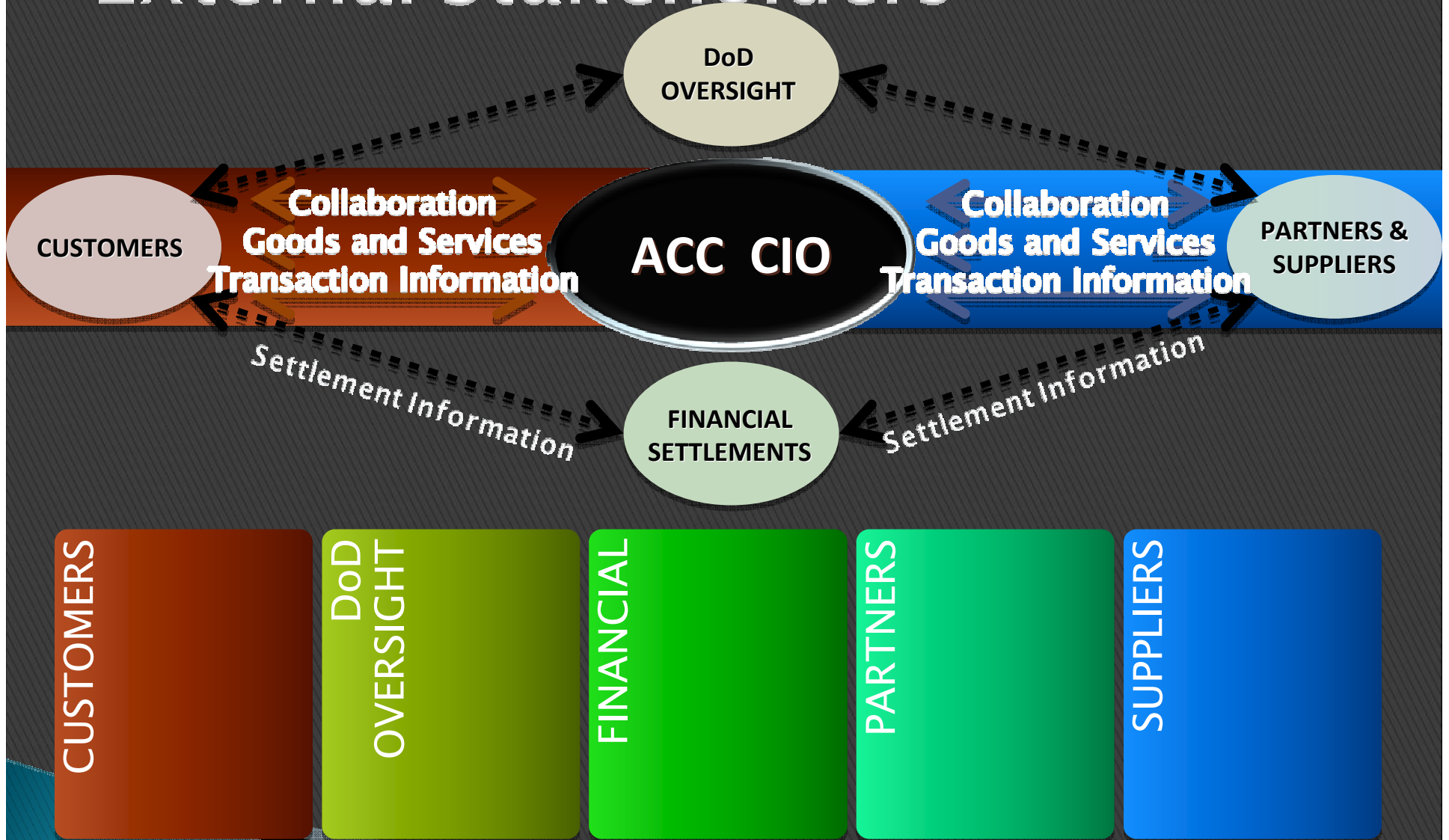
Strategic Planning Process



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External Stakeholders

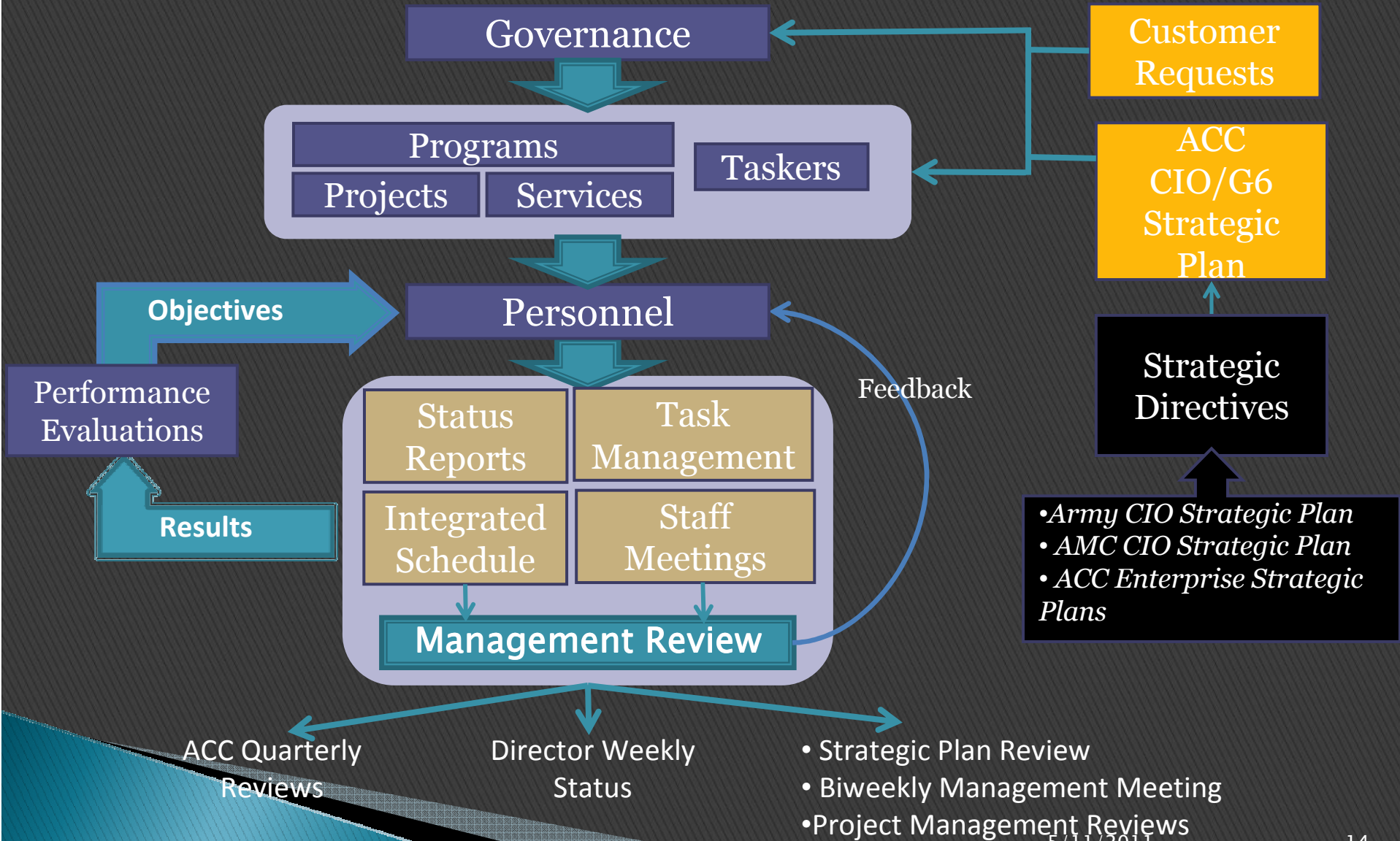


Pairs Discussion

Reflect on your best strategic planning experience

- ▶ What contributed to making it your best experience?

Operating Model



Tracking Tools

- ▶ Strategic Plan
- ▶ MS Project Plan (Integrated Master Schedule)
 - ▶ Organized by elements of the strategic plan
 - ▶ Identification of projects

Strategic Plan Outline

Goal 2: Facilitate Knowledge Sharing across ACC Enterprise

Obj. 2.1: Grow and Develop a professional IT workforce

Strategy 2.1.1 Dev. IDPs for G6 staff

Strategy 2.1.2 Incorporate strategic goals in annual goals

Strategy 2.1.3 Pursue IT certification for G6 staff

Obj. 2.2: Deploy collaboration tools to enable knowledge sharing

Strategy 2.2.1 Establish & standardize a single task tracking tool

Strategy 2.2.2 Deploy instant messaging capability

Strategy 2.2.3 Deploy ACC Enterprise Web Solutions

Strategy Implementation

- ▶ Process workshops
- ▶ Taught basic MS Project skills to PMs to update their tasks
- ▶ Kept IMS on SharePoint for all to access / update
- ▶ Provided a manual process (PDF) to update tasks
- ▶ Weekly reminders; reviewing dates / late activities in senior leadership meeting

Update Process



IMS Tool Worksheet

New Strat Outline	Task Name	Status	Duration	Start	Finish	% com	Resource Names
1.0.0	<input type="checkbox"/> Strategic Goal 1: Establish and Execute an IT Governance Process		903 days	Wed 10/1/08	Thu 4/12/12	66%	Greg Youmans
1.6.0	<input type="checkbox"/> Objective 6: Institutionalize a Program Management (PM) culture		724 days	Wed 10/1/08	Thu 8/4/11	88%	Deb Kee
1.6.1	<input type="checkbox"/> Strategy 1: Establish a Program Management Office (PMO)		680 days	Wed 10/15/08	Thu 6/16/11	85%	Gino Magnifico,Greg
1.6.1	<input type="checkbox"/> Develop Plans, Templates, and Procedures		472 days	Mon 8/3/09	Thu 6/16/11	71%	Kim Douglas
1.6.1	<input type="checkbox"/> Define PMO Service Model		171 days	Mon 10/11/10	Thu 6/16/11	51%	Marisa Sanchez
1.6.1	<input type="checkbox"/> Develop PMO SOPs		108 days	Wed 11/10/10	Mon 4/18/11	65%	
1.6.1	<input type="checkbox"/> Training		32 days	Tue 2/22/11	Wed 4/6/11	47%	Brian Brennan
1.6.1	Incorporate team input		14 days	Tue 3/8/11	Fri 3/25/11	36%	Brian Brennan
1.6.1	Review Draft with G6 Sr. Leadership		5 days	Mon 3/28/11	Fri 4/1/11	0%	Brian Brennan
1.6.1	Incorporate G6 Sr. Leadership Comments and finalize draft		2 days	Mon 4/4/11	Tue 4/5/11	0%	Brian Brennan
1.6.1	Post SOP to web		1 day	Wed 4/6/11	Wed 4/6/11	0%	Brian Brennan
1.6.1	<input type="checkbox"/> Develop PMO Reporting		111 days	Mon 8/14/10	Thu 8/18/11	88%	Deb Kee

Control & Evaluation Benefits

- ▶ Streamlines status reporting
- ▶ Provides more reliable project scheduling
- ▶ Forecasts impacts of scheduling changes
 - Dependent tasks/activities
 - Milestone deliveries/deadlines
- ▶ Acts as an early warning tool
- ▶ Helps to improve communications to clients

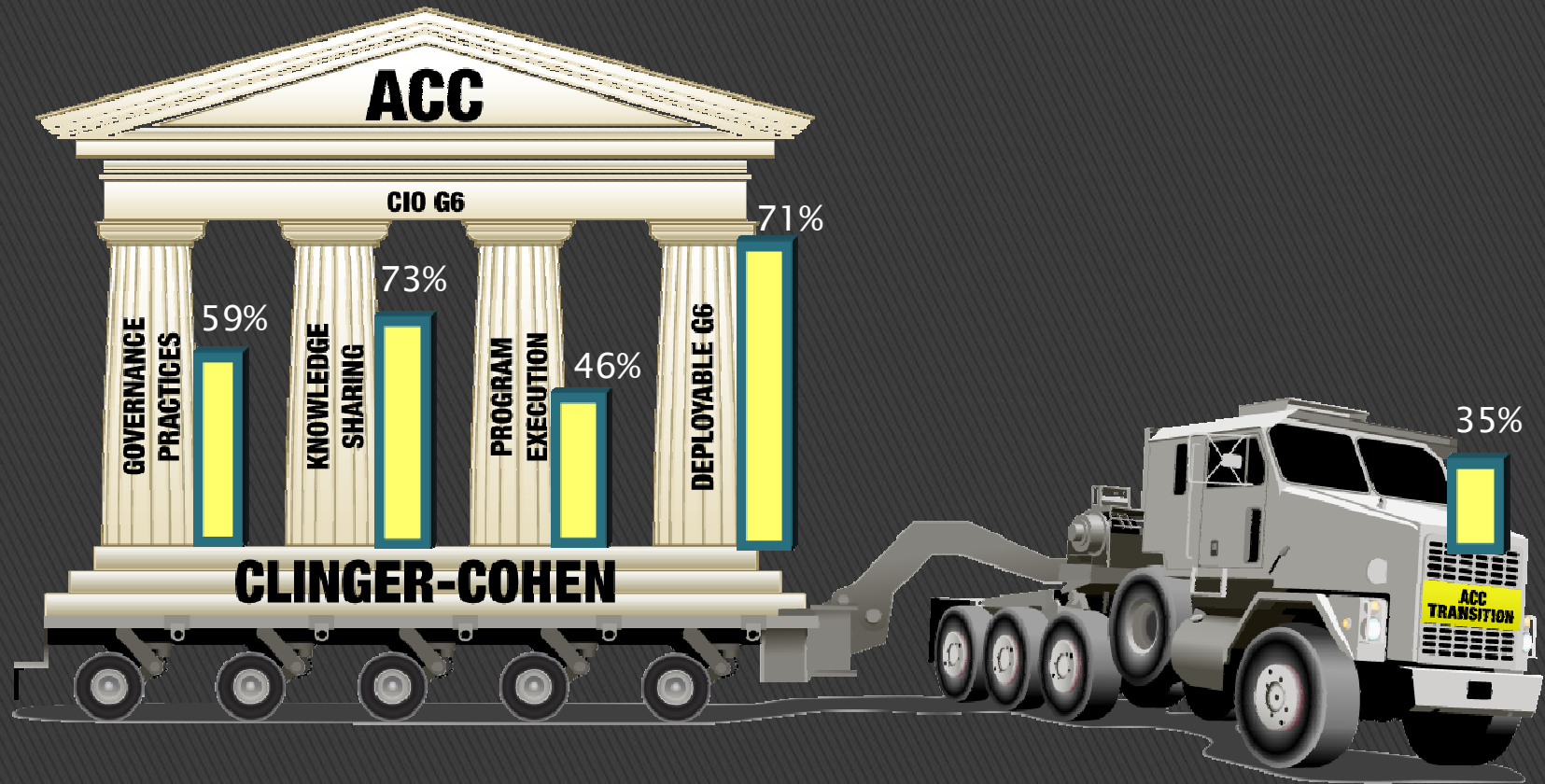
Management Benefits

- ▶ Team & Individual Goals = Strategic Goals
- ▶ Individual Contributions Identified and Acknowledged
- ▶ Focus on Objectives
- ▶ Respond to Change

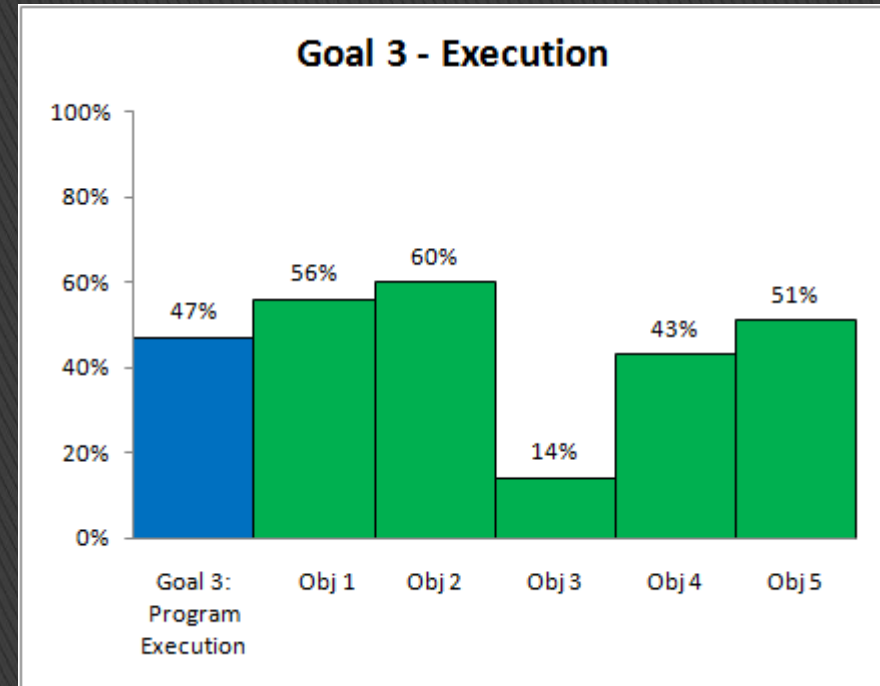
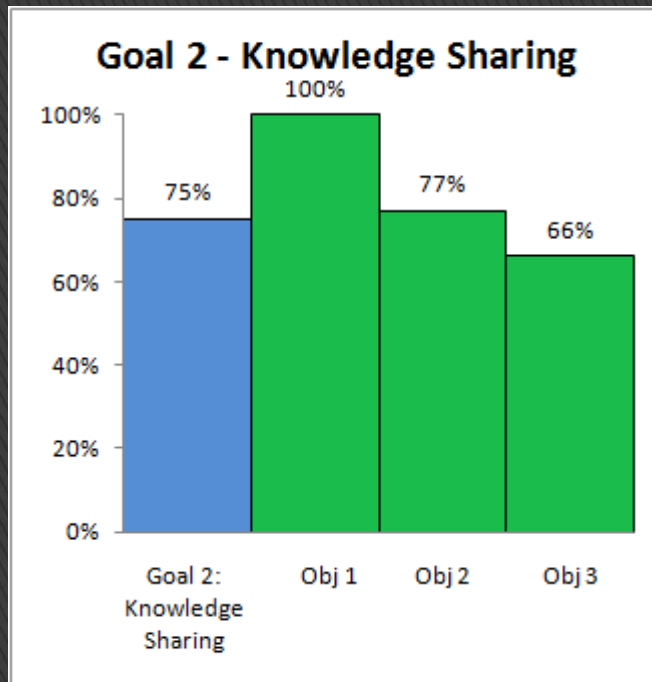
Quarterly Reviews

- ▶ Standard: Review percent complete by goal
 - How are we doing? Prioritization, resourcing
 - Do these strategies still make sense?
- ▶ Continuous alignment with changes in the organization / environment
 - Transition goal
 - Key turnover activities
- ▶ Other Topics:
 - Leadership and change
 - Process of standing up new services
 - Strategic communications

Communications



Communications



Lessons Learned

Discipline

Plan Development

- In a complex world, 18-month plans are strategic
- Leadership commitment and focus is critical
- Broad and focused participation

Tools

- Don't let the tool get in the way; tracking and making mid-course corrections are most important

Reviews

- Hold regular reviews; target a minimum of 4 hours so focus can stay strategic

Communications

- Use all opportunities to communicate strategy
- Regularly communicate the “line of sight” -- the connection of how team members contribute to the achievement of the strategic goals

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Results

Pairs Discussion

Reflect on your best strategic planning experience:

- ▶ What might you do differently based on our conversation today?
- ▶ What other tools or techniques have you used to keep your strategic plans “in action”?

Conclusion

Keeping the strategic plan “in action”

- ▶ Focus on key strategic activity
 - Identified 4 major projects to execute strategy
- ▶ Results-driven
 - Measured regularly in biweekly status meetings and quarterly project management reviews (PMR)
- ▶ Improved organization effectiveness and efficiency
 - Services have been established and expanded
- ▶ Clear messaging both to external stakeholders and internal organization members
 - Use key strategy graphics in presentations to external stakeholders
 - Tie all projects to strategic goals in PMR, All Hands