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BUSINESS PLANNING PHASE

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BUSINESS PLANNING WORKSHOP

This workshop can be used at any management level, for: Strategic Planning; Tactical Planning; Operational Planning; or to define Business Plans for a project. It is therefore generically called a *Business Planning Workshop*.

Purpose

The purpose of the Business Planning Workshop is to develop an initial business plan (if none exists) – or to refine an existing plan – for later use in Enterprise Architecture. This uses the Strategy Analysis methodology for business planning. It is used to determine both the Planners' View and the Owners' View of the Motivation ("Why") column within the Zachman Framework for Enterprise Architecture.

Preparation

To prepare for the Business Planning Workshop, the facilitator first reviews the enterprise Strategic Business Plan and/or the relevant Business Plan for the Business Unit project area intended as a starting point for the Enterprise Architecture project.

The Business Planning Questionnaire is downloaded from the link below. This is tailored by inserting the enterprise Mission and Purpose statement in Question 1a). The other questions are reviewed, and reworded or tailored to reflect the enterprise's terminology or environment.

- [Download Questionnaire for Business Planning Workshop](#)
(as zipped Word file)

The Questionnaire is then distributed 2 – 3 weeks before the start of the workshop to all invited Business Planning Workshop attendees. It is to be completed by each individual and returned prior to the commencement of the workshop so all responses can be consolidated. On their receipt, all responses are consolidated anonymously under each question. This Consolidated Questionnaire will be distributed to all participants at the start of the Business Planning Workshop for use as a catalyst by the facilitator.

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Activities

During the Business Planning Workshop, the Strategic Business Plan of the enterprise and the Business Plans for the Enterprise Architecture project area are all reviewed. The Consolidated Questionnaire responses are used as catalysts to define Planning Statements of: Mission and Purpose; Policies, Objectives or Strategies; Markets; Products and Services; Channels; and Strengths, Weaknesses, Opportunities and Threats. These statements are defined by the attendees in group sessions. They may optionally be captured in a modeling tool for reference and use in later workshops. Priorities that are sorted by priority level indicate the most important Policies, Objectives or Strategies that will enable the enterprise to achieve its strategic objectives and direction.

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Duration

5 days of group sessions. After each planning step is introduced, the attendees work together in separate teams to define or refine relevant statements. Each team presents its defined statements for review by the other teams. The most suitable statements selected by the groups from all of the alternatives are then used by all groups as the starting point for the next planning step and its group session.

Deliverables

Following this workshop, the deliverables produced are the following refined and agreed Business Planning statements:

- Mission and Purpose for the business project area
- Prioritized Policies, Goals and Objectives, and Strategies
- Prioritized Markets, Products, Services and Channels
- Statements of Strengths, Weaknesses, Opportunities and Threats
- Implementation Accountabilities by Business Area

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Scope

The entire business enterprise itself, or a business unit, a division or a project area.

Participants

Managers, business experts and IT staff of the business area defined by the project scope.

Format

The workshop comprises lecture sessions and hands-on group sessions that immediately apply the principles introduced in each lecture session for the defined project area.

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FACILITATOR

Clive Finkelstein

Clive Finkelstein is acknowledged worldwide as the "Father" of Information Engineering, and is Managing Director of Information Engineering Services Pty Ltd in Australia. He has over 43 years' experience in the Computer Industry. He has published many books and papers, and contributed Chapters and Forewords to books published by McGraw-Hill and Springer-Verlag. Clive has authored the following books:

- *"Information Engineering"*, James Martin and Clive Finkelstein, Savant Institute, Carnforth: Lancs UK (1981). This was the book that started the Information Engineering Revolution in the 1980's.
- *"An Introduction to Information Engineering"*, Clive Finkelstein, Addison-Wesley, Sydney: Australia (1989). This book covers the history and evolution of Information Engineering.
- *"Information Engineering: Strategic Systems Development"*, Clive Finkelstein, Addison-Wesley, Sydney: Australia (1992). This is the "how-to" book on using Information Engineering.
- *"Building Corporate Portals with XML"*, Clive Finkelstein and Peter Aiken, McGraw-Hill New York: NY (2000). This book covers methodologies and technologies for Enterprise Portals.
- *"Enterprise Architecture for Integration: Rapid Delivery Methods and Technologies"*, Clive Finkelstein, to be published in 2005. This brings together the methods and technologies for rapid delivery of Enterprise Architecture in 3-month increments. This activity is based on material from that book.

Clive Finkelstein is an internationally renowned consultant and instructor, and has completed projects for Defense, Government and Commercial organizations throughout the world and in most industries. Many projects have involved the *Zachman Framework for Enterprise Architecture*, using the latest methods and technologies for rapid delivery of priority areas into implementation. These methods use Enterprise Engineering for rapid definition of Enterprise Architecture. His technology focus addresses Enterprise Integration technologies using XML, Enterprise Application Integration (EAI), Enterprise Portals, Web Services and Service-Oriented Architecture (SOA) for Business Process Management (BPM) using XML-based BPM languages.

He provides training and consulting in all aspects of the Zachman Framework for Enterprise Architecture, with rapid delivery of priority areas using Enterprise Engineering. His application of these methods in large and medium Government, Defense and Commercial enterprises results in *Business Transformation Enablement*, so that business and IT managers and their staffs can plan for and achieve rapid business change. Enterprise Architecture provides a Governance Analysis Framework that supports Sarbanes-Oxley and other Governance Audit requirements. It provides direct support and linkage to Balanced Scorecard for Strategy-Focused Organizations, to ensure that IT systems and databases support defined Scorecard Measures, Strategy Maps and Governance requirements.

Clive writes a monthly column, "The Enterprise" for DM Review magazine. Past issues are at <http://www.dmreview.com/>. He publishes a free, quarterly technology newsletter via email: "The Enterprise Newsletter (TEN)". Past issues of TEN are at: <http://www.ies.aust.com/>. His books and papers are at <http://www.ies.aust.com/cbfindex.htm>. He can be contacted at cfink@ies.aust.com. Many in-house skills-transfer courses and seminars presented by Clive Finkelstein are at <http://svc004.bne009i.server-web.com/catalogue/visible/default.shtml>.



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