

Plan Your Work, Work Your Plan: Practical Advice for Project Planning

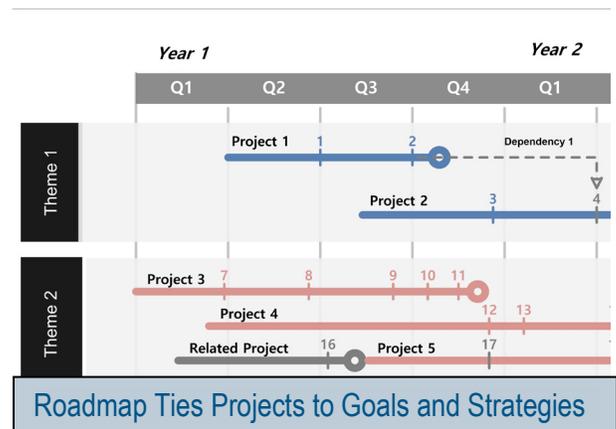
By Sandy Kleinberg, Practice Lead, Business Architecture

Growing up, I enjoyed a wood-working class and my teacher had a favorite saying; “plan your work and work your plan.” This advice applies to IT strategy and initiative planning as much as it does to wood-cutting projects. This article is about a company that successfully planned and executed projects that tied to the organization’s strategies – and increased profits. The initiative planning was key to their success.

Background

A large financial institution realized that they were leaving a **lot** of money on the table in one of their core businesses and that they needed a new strategy to start realizing those additional profits. The organization made a time investment to strategize and plan their initiatives.

They started with a complete understanding of the competitive marketplace and then engaged in an initiative planning activity that linked their goals and strategies to executable projects via a **roadmap**. The organization went on to launch the projects and to consult and update the roadmap when conditions on the ground changed.



What Did The Company Do Right?

► Leadership

The organization started off on the right foot by gaining agreement from executive leadership and the project board that they didn’t want to do the “same old thing” in this situation. They wanted to do it right and the organization’s leadership thought of the planning activities as an investment and gave the team the time to take a thoughtful approach to the situation. The VP of the area who was the sponsor of the planning engagement was both open minded to the process and ready to help direct the activities. The sponsor made the participants feel comfortable sharing their thoughts and ideas but wasn’t afraid to make decisions when necessary. The organization was very clear about its primary goal for this strategy and matching initiative and defined the specifics of success.

► Collaboration

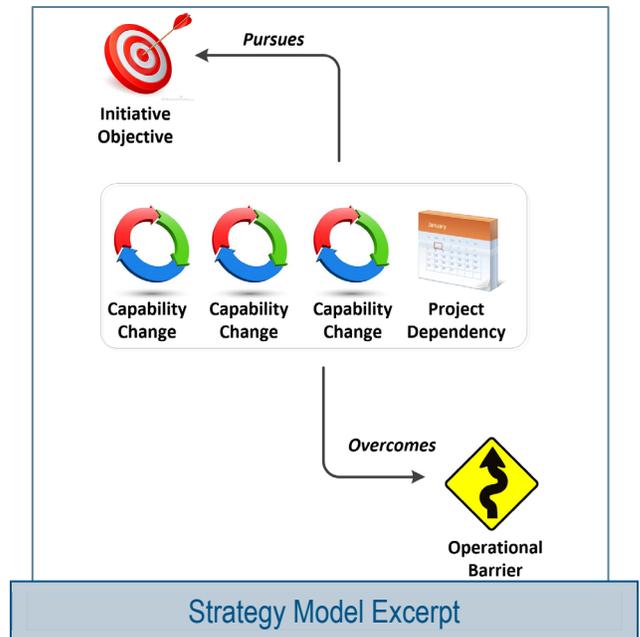
The sponsor made the right people available for workshops so that the knowledge and creativity was present at the right times. Subject experts from all over the organization were present to support scoping activities or to help validate strategies. When other business units were impacted, the sponsor invited their leaders to participate as equal peers in the process which resulted in much greater reality in the dependencies of the plan. Even key vendors were involved in the process to weigh in on their activities.

► Currency

This organization recognized the executable roadmap as what it is: a planning tool. They used the roadmap to drive the pipelining process with their project board and to produce the kind of materials that the project team actually needed to know to be successful.

More importantly, they used all of the information in the plan to evaluate the impacts of change and updated and communicated the changes in the same formats as the original plan.

This practice had the effect of keeping everyone up-to-date in a fashion that they were already comfortable with.



Conclusion

This financial institution jumped feet first into a disciplined approach to their new strategy and the initiatives to execute it. The result was a more robust core business and a quantum leap in understanding among other business areas on their strategy and the basics of operation. When conditions on the ground changed, they consulted their plan to determine impacts and help others visualize the impacts of the change.

Want to learn more?

Contact [Sandy Kleinberg](#), Business Architecture Practice Lead, 585.454.4250 x145 to talk about an approach that may make sense for your organization.

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