INFORMATION TECHNOLOGY

Strategic Planning

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A strategic plan is vital to creating and maintaining an organization’s direction.

I once worked with a contractor who had a large church project. He said he was very surprised when he received the plans; this small and relatively unknown church was building a structure that was more than four times the size needed for its congregation.

When he questioned this, the church leaders confidently stated they did not need a church for their current congregation; they were building for the congregation they would have in 5-10 years.

Compared to other industries, those in construction are slower to adapt to new technology. But over the past several years, contractors’ demand for technology has significantly increased.

As a result, solutions have been added one product at a time, often without linking or connecting multiple solutions. This has created redundant systems, inefficiencies, work-around solutions, and even ineffectively use of the technology itself.

An Information Technology (IT) strategic plan is vital to maintaining your company’s competitive edge and surviving the digital era. The rapid pace of advancing technology, many unknown factors, and the complicated nature of the solutions pose many challenges.

Thinking strategically means that you should “seek innovation and imagine new and very different futures that may lead the company to redefine its core strategies and even its industry.”

Preplanning

An IT strategic plan can be included as part of your company’s business plan or created as its own unique plan. Before the plan is developed, it’s important to carefully select the team that will create and maintain it. Be sure to include a strategist – someone with experience...
Defining your company’s goals and objectives involves leadership and strategic thinking. Goals will steer the company’s direction and must be embraced by management. Many companies define technology goals and objectives in such generic terms as:

- Eliminate redundancy
- Access information faster
- Write custom reports

While these outcomes are desirable, are they really what you want to plan your technology budget around? Is this going to give your company a competitive edge and make it stand out?

Goals should define what the company wants to accomplish. For your IT strategic plan, consider the following:

- Achieve project partner collaboration – Develop collaboration sites (by project) that allow all project participants to review current project documents. This includes the contractor’s management and project teams, subcontractors, and owners.
- Establish efficient and technically accessible jobsite setup – Mobilize technology to roll out to jobsites quickly with minimal setup and training.
- Support subcontractor relationships – Train subcontractors and provide them access to technology used to manage projects.
- Increase responsiveness to owner requirements – Produce reports, forms, and documents quickly and as requested by owners.
- Enable employee success – Provide tools and resources employees need to perform their jobs efficiently.

In addition, IT strategic goals and objectives must have specific characteristics. They must be:

- Clear and concise
- Measurable
- Defined by what is important to the company
- Developed by and/or with management
- Supported and promoted by management
- “Owned” by the company
- Considered prior to all technology decisions

aligning IT strategies with the company’s business strategy. This might include an IT advisor, CFM, accounting advisor, or other knowledgeable resource who can help define the company’s direction and guide management, IT staff, and representatives from accounting and operations – the end users of the software solutions.

When selecting the team, beware of biases and limited systems knowledge. Biases can be with the technology as well as within the company (i.e., pushing decisions on solutions that favor “known” or familiar technology or favor one department over another). Limited knowledge of systems could unnecessarily limit the scope of solutions.

**Strategic Planning Steps**

In a strategic plan, a company’s direction is defined, goals and objectives are identified, and a course of action is put in place to achieve them. (See Goals & Objectives Sidebar.) Here are some steps to help guide you through this constantly evolving process:

**Gather Resources:** This includes all human, financial, and technical resources, as well as background knowledge required to develop and maintain the plan.

Consider using a web-based collaboration tool to help manage this process. (Perhaps you can use the same one your company uses to manage its construction projects.) There are a number of low-cost (or free) collaboration resources available online. This will help improve overall project communication and maintain the data collected and generated.

**Ensure Commitment:** Ensure commitment from management and the strategic planning team to encourage company-wide buy-in. A key member of upper management should be on the committee as an executive sponsor to help ensure management’s commitment. Consider obtaining signed agreements from each team member to encourage commitment.

**Meet & Create:** Use all available information to plan, predict, and strategize. In order to keep the team enthusiastic and encourage participation throughout the creation of the plan (which is typically two days), here are some helpful tips:

- Plan the meeting in advance and define a clear purpose.
- Hold the meeting at an offsite location.
- Be careful not to justify a course of action that has already been decided.
- Avoid tunnel vision and ensure all options are considered (e.g., if the desired direction is to locate a fully integrated software solution, explore stand-alone solutions as well).
• Be open to suggestions from employees throughout the organization, as well as changes in technologies.

• Manage the scope of the discussions, bring in experts as needed, and encourage the continual flow of ideas.

Communicate: Share and communicate the plan within the organization, as well as to your external vendors and advisors. It’s important to answer the following questions:

• Why are we doing this?
  - Reduce duplicate entries and errors.
  - Streamline the billing process (e.g., produce invoices in one day).
  - Provide detailed and accurate proposals.
  - Respond quickly to customer requests.

• How are we doing it?
  - Research and review potential IT solution providers.
    > Send Request for Information to solution providers and compare results.
    > Arrange software demonstration focused on the specific requirements.
  - Develop process maps for review and potential reengineering.
  - Develop detailed implementation plans.

• Who is involved?
  - Representatives from all areas of the company and/or key individuals from areas that are considering changes.

• What is the desired outcome?
  - A competitive edge.
  - Efficient and timely processing and reporting.

Implement & Execute: For your IT strategic plan to be effective, it must be put in place and maintained. Roles, responsibilities, and tasks must be determined and deadlines set. This is one of the most difficult steps and often the cause of plan failure. Take a look at the exhibit at right for sample roles and responsibilities.

Evaluate & Update: Review the progress and update the plan regularly. The plan cannot be static – it must be a living document.

Final Thoughts

As Ralph Waldo Emerson said, “Life is a journey, not a destination.” Similarly, IT strategic planning is a journey. A solid, well-managed plan will lead the company into the future with the hope and promise of a successful organization.

It may be time for your company to invest in technology to improve its systems and information to help provide competitive advantages, as well as the tools employees need to be productive and efficient.

Now, get your IT strategic planning team together and begin the journey.

Endnote: