

# BUSINESS PLANNING PHASE

## CONTENTS

...

- Activities
- Duration
- Deliverables
- Scope
- Participants
- Format
- Facilitator

---

## **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.

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.

---

### **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.

---

### **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
- 

### **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.