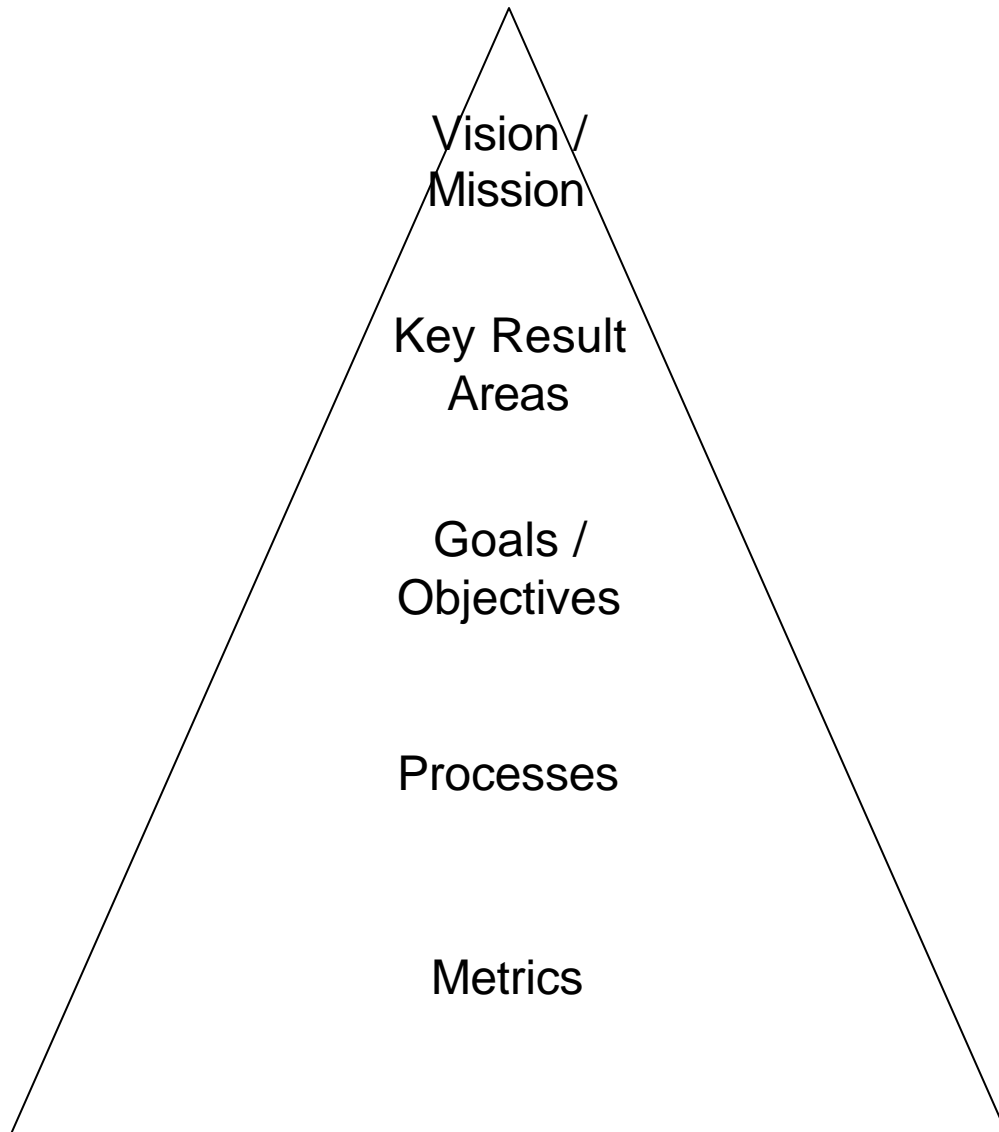


# Strategic Planning Process



*“Start with the end in mind” – Habit 2 – Seven Habits of Highly Effective People*

The strategic budgeting process is one of going from the general to the specific to develop requirements, measurements and even daily tasks.

At the highest level is the Vision or Mission: What is our purpose in life? What does my group do to support the higher level mission? The mission for Product Delivery is:

*Deliver products fit for use.*

Fit for use is a loaded expression for those of you familiar with Deming and Juran.

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The next level down is the Key Result Areas (KRAs): What is really important to us to accomplish this mission? In what areas do we place our limited attention? The areas I have chosen as my KRAs are:

- Personnel
- Tools
- Training
- Process
- Deliverables
- Budget

The next level is Goals / Objectives: What do we want to accomplish?

The next level is Process: How are we going to accomplish these goals?

The final level is Metrics: How are we going to measure progress? How do we know we've "arrived?"

These final three levels are summarized in the following tables by KRA.

As this document stands at this moment, it is *MY* plan. I will meet with you to discuss it, and work with you to make it *OUR* plan. You will still have to do your own planning for your own groups, and with your staffs to make all of this work.

Finally, each of us as individuals, given the group plan, should develop a personal plan. These plans can be expressed as part of the performance feedback process.

PERSONNEL

Project	Goal	Process	Metric
Staffing	Have adequate staff to do the job.	Have a hiring and retention plan from each manager	Headcount: 3 Managers plus staff Have staff projections for this FY by Feb 29.
		Have at least quarterly review of morale (feedback and management discussion)	Employee turnover Morale survey results Team building plans by Mar 31 Projected raises w/strategies by Feb 29
Turnover	Have no unplanned turnovers	Have a team building plan from each manager.	
		Have projected pay raises and a strategy for all raises outside the guidelines.	
Performance Evaluations	Have an effective performance evaluation system.	Review current evaluation system and those from other companies. Discuss with other managers	A documented performance evaluation system by Feb 29 with revisions by Sep 30.
		Deliver all compensation performance evaluations on time to get pay raises for end of month due	On-time pay raises
		Have quarterly evaluations.	Quarterly evaluations delivered
		Have a plan for a 360-degree evaluation.	Plan delivered by Sep 30.

TOOLS

Project	Goal	Process	Metric
Hardware	Have adequate hardware to do the job.	Develop an equipment plan for group activities, such as labs and pool resources	Have a plan from each manager by Feb29
		Develop an equipment plan tied to new hires.	Have a plan from each manager by Feb 29
Software	Have adequate software to do the job	Identify new software requirements for group activities such as configuration management software, test tools or software for pooled resources	Have a plan from each manager by Feb 29.
		Identify new software requirements based on individual requirements such as new hires and upgrades.	Have a plan from each manager by Feb 29.
		Identify license upgrade issues.	Document when and how much is due on existing licenses from each manager by Feb 29.

Acquisition	Have acceptable response time to acquisition requests.	Learn how the procurement cycle works and develop a plan to make it work.	A set of guidelines on what response times should be by Feb 29. A plan on how to improve by Mar 31. Revised goal on Mar 31.
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TRAINING

Project	Goal	Process	Metric
Job Knowledge	Increase knowledge of company	Engage guest speakers.	General figures for budgeting by Feb 29. First draft of a group level training plan by Mar 31. Second draft by May 31.
	Increase knowledge of industry	Web research. Guest speakers	
	Increase knowledge of customers	Web research. Plant visits	
	Increase knowledge of product	dcAcademy, hands on-experimentation, internal sharing.	
	Increase knowledge of technology (specific skills you need to do your job)	Formal training, internal sharing.	
	Increase general business skills	Formal training, self-study	Personal training plan as part of goals in performance evaluations.

PROCESS

Project	Goal	Process	Metric
Planning	Keep the plan current.	Review the master plan quarterly and revise as required.	Amended plan each quarter.
		Review internal plans quarterly and revise as required.	Amended plan each quarter.
Universal Process	Use and improve the UP.	Review the UP quarterly with the UP team	Quarterly meetings and revisions.
		Develop group level implementation plans.	Group level plans by Jun 30.
Initial Delivery	Have an efficient delivery system	Review current successes and areas for improvement	Have an initial delivery plan by Feb 29.
		Learn more about customers by working with AEs and other contacts to develop a customer base.	
		Develop a Beta test program.	Have a beta test program plan by Mar 31.

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Internal Operating	Have efficient internal operating procedures.	Develop and document process for internal processes such as CD delivery, configuration management, or document review.	A project schedule for the initial set of plans from each manager by Mar 31 Documented plans delivered in accordance with the schedule.
		Review internal plans periodically to make sure they are still applicable, and to improve them.	Quarterly reviews, or reviews in accordance with the plans developed above.

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DELIVERABLES

Project	Goal	Process	Metric
Documentation			
Courseware			
Certifications			
Test plans/reports			
Media			
Initial installation reports			

BUDGET

Project	Goal	Process	Metric
Expense Budget	Have an accurate expense budget	Develop and revise a model for predicting and tracking expenses.	Submit a budget by Feb 29. Track expenses and compensation as required.
Compensation Budget	Have an accurate compensation budget	Develop and revise a model for predicting and tracking compenstaion.	Revise estimate on Sep 30. Provide input for next FY in Oct.