

Gartner®

Rethink the IT Strategic Plan

A framework for CIOs to recalibrate



Mandate for CIOs: Adjust strategic plans for fast-changing times

It's easy to confuse the essence of strategy with a more detailed strategic plan, especially when conditions are changing fast and the horizon for change is short. Job No. 1, then, is to know the difference and why it matters.

Strategy

Defines the long-term direction of the enterprise, articulating what the enterprise will do to compete and succeed in its chosen markets or, for the public sector, what the agency will do to achieve its mission.

Strategic plans

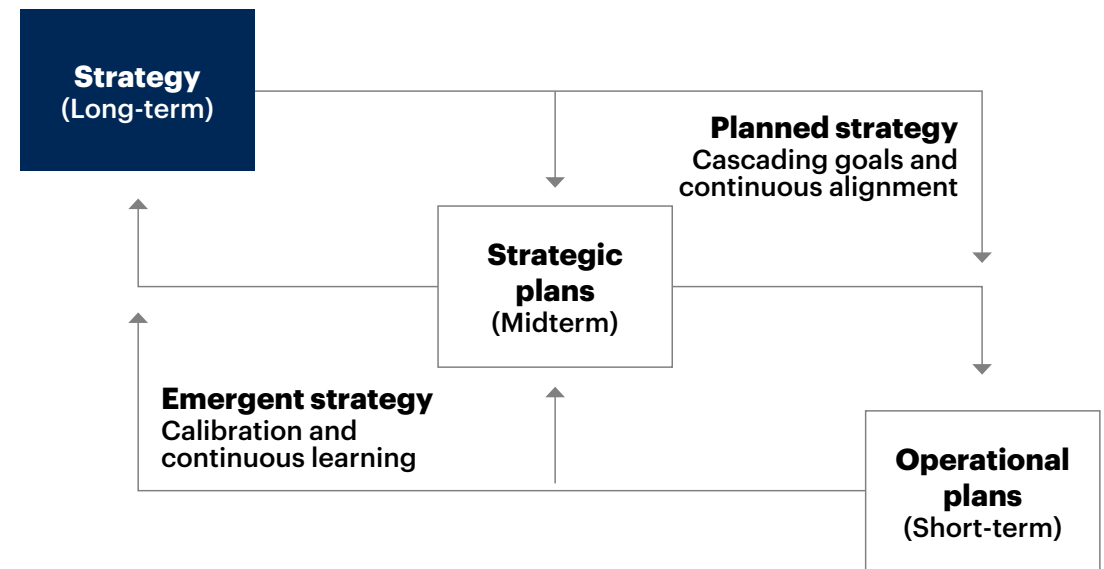
Define how the enterprise will realize its long-term ambitions. They identify the roadmap of initiatives and portfolio of investments required to achieve the objectives defined in the strategy.

Operational plans

Deal with the execution of specific projects and changes, as well as any operational tasks not contained in the strategic plan, such as regular software upgrades or hardware maintenance.

In fast-changing conditions, CIOs and technology leaders will probably need to partner to recalibrate their strategic plans more often, based on new enterprise strategies, [scenario planning](#) results or events.

The strategy process



Responding to the impact of COVID-19

Few strategies and strategic plans, if any, will survive the COVID-19 pandemic unchanged.

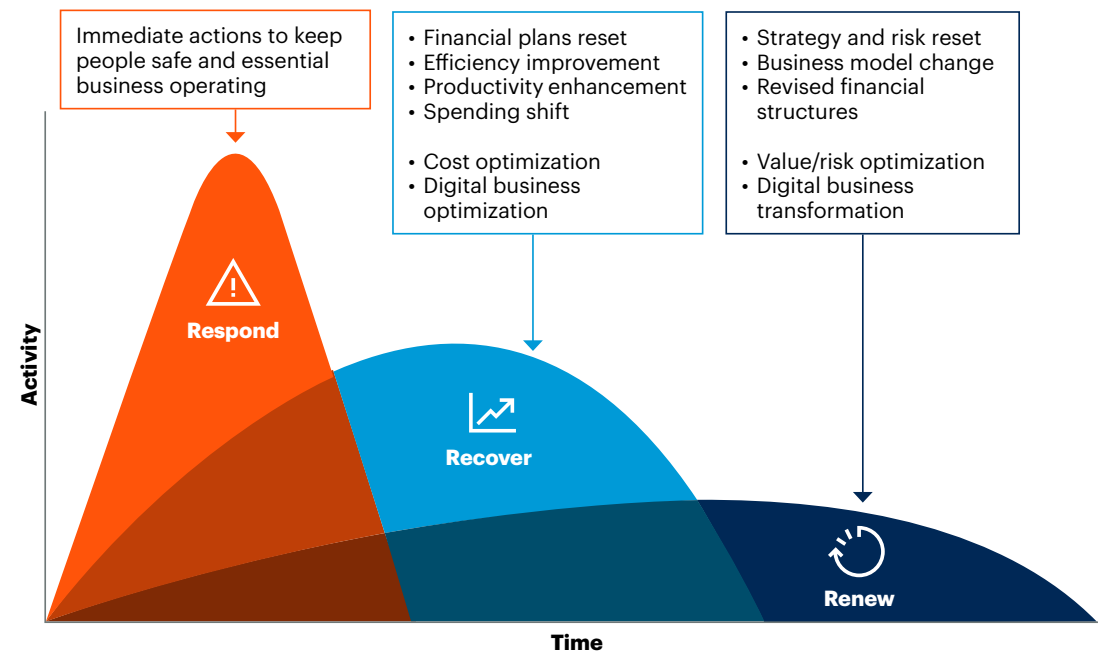
In response to the pandemic, many enterprises had to suspend some of their activities; others deployed temporary solutions in extremely short time scales. In some cases, these activities involved changing existing capabilities and building or acquiring new capabilities.

According to a May 2020 survey of Gartner Research Circle participants, 43% of organizations say they are planning their “new normal” strategies. This will involve decisions about whether changes made in response to the pandemic should be reversed or reinforced over the long term. The Gartner Board of Directors Survey in August also showed that seven out of 10 boards have accelerated digital business initiatives in the wake of COVID-19 disruption.

Post-pandemic recovery will require CIOs to rethink the information technology strategic plan and recalibrate execution in the midst of these pending changes to the long-term strategy and ongoing uncertainty and volatility.

The checklist provided in the following pages outlines a series of questions to guide technology leaders as they look to recalibrate. (This process doesn't replace strategic plan development.)

Phases post-pandemic outbreak



Source: Gartner

3 steps to recalibrating the post-pandemic IT strategic plan

This three-step approach helps CIOs and other technology leaders to determine whether and to what degree they might need to refocus or recompose their existing IT strategic plans as a result of their crisis response. And after assessing the existing strategic plan, whether they also need to:

- Reprioritize the roadmap to address conflicts or issues
- Reset the communication of and engagement in the plan
- Revalidate planned performance

Step 1:

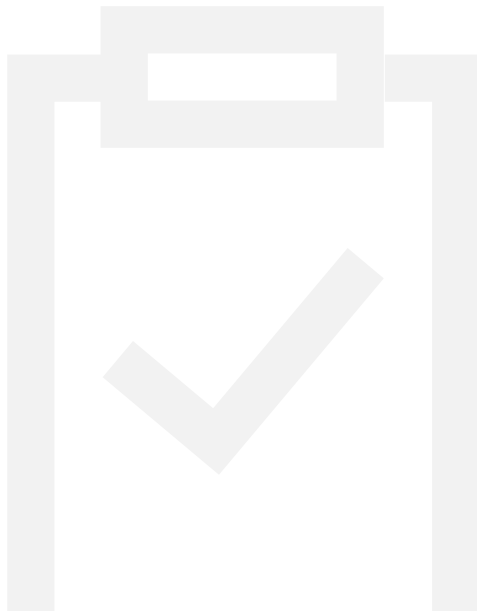
Determine how much the strategic plans have changed. Across a series of questions, you'll note the extent of changes made in response to the crisis, and the impact of that change on the existing strategic plan.

Step 2:

Identify next steps, depending on the degree of impact — none, minor, major or critical.


Step 3:

Initiate, update or refresh the strategic plan, based on new business context or direction. Adjust for priorities and timing of execution, develop communication and investment plans



Step 1: Determine how much strategic plans have changed

Select one in each row

None  Many/All

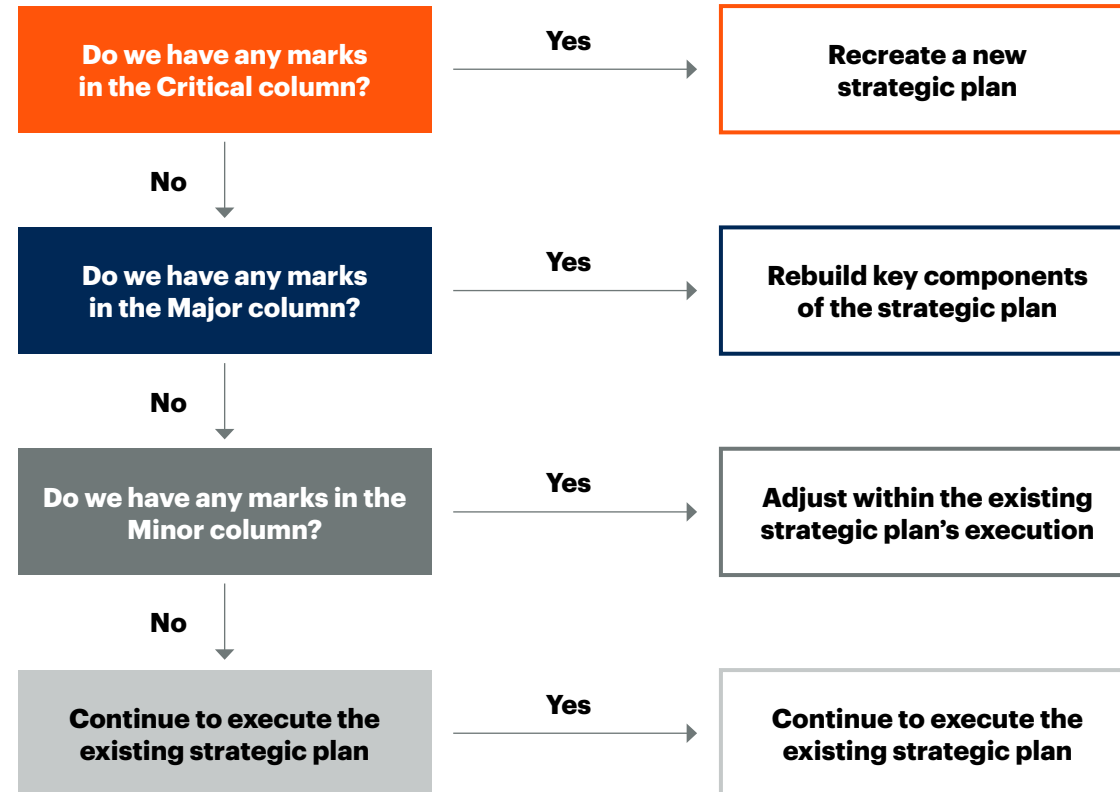
Strategic actions	During the Respond phase, did we make any changes to existing business capabilities that now need to be reversed or strengthened?				
	During the Respond phase, did we build or acquire any new or temporary capabilities that are no longer required? Or that need to be made permanent?				
	Are any of the IT strategic actions supporting business objectives or goals that are no longer valid?				
Strategic principles	Have there been any changes to the business objectives, goals or strategies that need to be reflected in the strategic principles? Have changes impacted the business model or markets?				
	Have any new strategic principles been established (either explicitly or implicitly)? For example, do we now require all solutions to be compatible with remote working/distributed teams?				
Strategic metrics	Have any of the business goals been revised (e.g., growth targets reduced or time scales for achieving goals changed), which will in turn impact the strategy metrics?				
	Has change occurred that is impacting the balance of cost, risk and value within the strategic plan?				
		None	Minor	Major	Critical

Step 2: Identify next steps

None → Many/All

None	Minor	Major	Critical

Use your assessment from Step 1 to determine your starting point on the decision tree



Step 3: Initiate, update or refresh the strategic plan

Use your assessment from Step 1 to determine your starting point on the decision tree

Recreate a new strategic plan

Initiate a new strategic plan. You likely need to do any or all of the following:

- Reprioritize and address conflicts
- Reset engagement and communication
- Validate strategic plan metrics and triggers

Rebuild key components

Update strategic plan. Check whether you need to do the following:

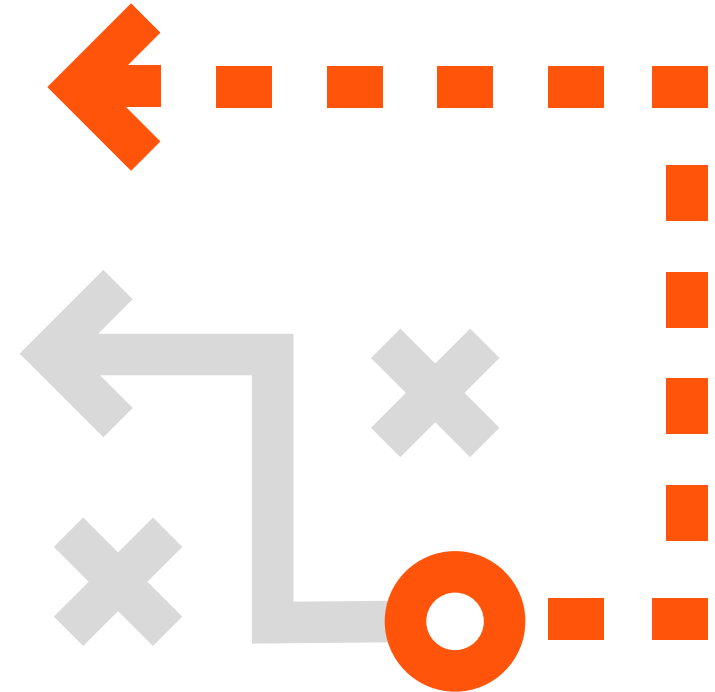
- Reprioritize and address conflicts
- Reset engagement and communication
- Validate strategic plan metrics and triggers

Adjust within the existing strategic plan's execution


Refresh plan. Expect to:

- Reprioritize and address conflicts
- Reset engagement and communication


Customize your next steps using the interactive templates on pages 8 to 10.




Reprioritize and address conflicts

 Type in the empty fields to complete the interactive form.		High-level descriptions For each question, describe or list impact to the strategic plan — e.g., data center renewal initiative stopped; budget suspended; and vendor resource contract on hold.	Rationale For each question, define a brief rationale for impacted items — e.g., stoppage superseded by cloud migration.	Planning impact For each question, determine the strategic plan impact — e.g., remove, rethink, reaffirm, no change.
Roadmap priorities	Within the strategic plan roadmap or portfolio, which initiatives or activities will need to be stopped, started or put on hold?			
	Which parts of the IT investment portfolio (products, programs, projects, services) will be revised to reflect changed/new priorities or direction during recovery?			
Budgeting	Have any business unit or departmental expenditures shifted/realigned as a result of the initial Respond phase?			
	Has current resource (funds, people, supplies) capacity (availability/constraints) impacted planned roadmap activities?			
Roadmap ownership	Have delivery responsibilities and accountabilities changed for the initiatives in the roadmap? For example, do we need to adjust ownership of planned business cases due to leadership changes?			
Calibrate roadmap	Have business case/justification benefits or success metrics changed within the planned roadmap or portfolio items? For example, expected business value has changed.			
	Will any delivery time frames/cost need to be adjusted or changed to address new/changed delivery methods (e.g., remote work, changes to contractors)?			

Reset engagement and communication

 Type in the empty fields to complete the interactive form.		High-level descriptions For each question, describe or list impact to the communication plan — e.g., delivery method, frequency, stakeholders, purpose, success measures.	Rationale For each question, define a brief rationale for impacted items — e.g., new communication vehicle required for remote workers; stakeholder impacted by organizational changes.	Planning impact For each question, determine the strategic plan impact — e.g., update and reaffirm, remove, reaffirm, no change.
Strategic plan communication	Which parts of the current communication plan are aligned with new/changed strategic plan components?			
Cross-enterprise dialogue	Which communication forums require change to ensure that proper dialogue, communications and collaboration are in place to address strategic plan activities (such as within IT or for the enterprise)?			
	How are those forums aligned to improve understanding of new/changed insights or expectations within the strategic plan?			

Validate strategic plan performance and KPIs

 Type in the empty fields to complete the interactive form.		High-level descriptions For each question, describe or list impact or changes needed foreplanned metrics or defined outcomes — e.g., measure/KPI validity assessed; strategic outcomes aligned.	Rationale For each question, define a brief rationale for impacted or changed items — e.g., data availability, performance changes, dashboard impacts.	Planning impact For each question, determine the strategic plan impact — e.g., remove, rethink, reaffirm, no change.
Results-oriented metrics	Are revised strategic objectives associated with at least one changed outcome measure?			
	Has the perception of business value or outcome changed? Are continuous review practices revised to reflect new strategic objectives and plans?			
	What changes are required to ensure dashboards and reporting practices reflect new or changed roadmap?			
Strategic plan derailment objectives	During strategic plan reviews, are any leading indicators (drivers) of initiatives in the plan failing or derailing? Does the plan need adjustment to fix, terminate or redirect resources for these initiatives?			

Respond. Recover. Renew.

Contact Us

U.S.: 855 811 7593

International: +44 (0) 03330 607 044

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