CM BRIEFING

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Avoid long-term strategies

When it comes to information management or content management strategies, particularly at the enterprise level, there is a strong tendency (and desire) to create long-term plans.

These plans may outline activities more than of 18 or 24 months in advance, starting with the deployment of base infrastructure, through to the final delivery of strong business functionality.

These plans mostly fail, and few ever end up delivering the hoped-for benefits. While this is not an argument for abandoning strategic planning entirely, it raises a question whether long-term plans are the most sensible approach.

This briefing will explore some of the issues encountered when creating and executing long-term plans, and will argue for an approach that delivers benefits on a much more frequent basis.

Source of long-term plans

Two– or three–year strategies are common in the domains of IT and IS. These types of strategies arise as a natural result of working *backwards* from the final objectives:

- The end result is identified, typically involving widespread and fundamental changes throughout the organisation.
- Major activities are identified to deliver these benefits, including changes to both technology and business processes.
- Underlying infrastructure will need to be put in place to enable the new functionality to be delivered. This typically involves purchasing new software.
- Detailed plans and specifications are needed to guide the selection, design and implementation of this solution.
- Business analysis needs to be conducted to identify overall business needs and specific requirements, as the primary input into the plans and specifications.

Each of these steps takes three to six months to complete, making the total project at least 12–24 months in total.

Unfortunately, many projects stall after the deployment of the enterprise software, and never deliver the broad changes that were hoped for.

Issues with long-term plans

There are many reasons why these long-term plans frequently fail, including:

- The ‘big bang’ approach is inherently risky, from a technology, budget and change management perspective.
- It is extremely hard to clearly articulate specific business needs a year in advance of even purchasing the software.
- The technology marketplace is still undergoing very rapid evolution, impacting on any purchased software.
- Implementation is strongly limited by the amount of organisational change required, rather than the technology capabilities.
- Independent business changes invalidate the scope or planned functionality of the project.
- Internal political changes kill the project before it has a chance to deliver benefits.

Often the political considerations have the greatest impact, with important players unwilling to wait two years to see the first tangible benefits be delivered.

Taking a step-by-step approach

While a long-term vision is always needed, a more practical approach is to structure the strategy in terms of six-monthly deliverables. More than just ‘low hanging fruit’, the goal is to deliver some tangible and visible benefits on a regular basis.

In this way, the project can be justified at any given point based on the benefits delivered by the current activities, rather than on functionality promised for a year or more in the future.

This involves a fundamental reshaping of the planning process, and a move away from the traditional ‘waterfall’ approach.

While underlying infrastructure will still need to be deployed, this is limited wherever possible, and tied directly to associated business benefits. Once the project has ‘walked the walk’ it then becomes possible to tackle bigger challenges.

(See the earlier article *10 principles for effective information management* for more on this.)