

The Human Sciences Research Council (HSRC) IT function adopted the StratSnap Critical Issues-based strategic planning process after I attended a conference talk by Dr James Robertson in 2004 or 2005. Dr Robertson's thesis stood out from all the other presentations because he put his finger on why so often IT-led projects fail to deliver business value. While other speakers were punting their latest product or framework, Dr Robertson offered practical advice, developed from first principles, on how to tackle IT failure. In a sense, he spoke truth to power because this was just not what speakers said at IT conferences. I was truly excited to meet him and talk.

The upshot was that Dr Robertson, a civil engineer and ex-military officer, gave the guest speaker talk at the Human Science Research Council's IT strategic planning workshop. At the time I was a consultant to the HSRC—programme manager responsible for planning and delivering the IT project portfolio. Next, we brought Dr Robertson in to help us develop a strategic plan for the HSRC Information Services function. This is where StratSnap came in.

StratSnap is a breathtakingly simple concept—simple to understand—and straight forward to work through providing you have a good facilitator. Dr Robertson is an excellent facilitator.

The StratSnap process recognizes that when you bring a leadership team together to work on a problem, a strategy or a roadmap, each leader will have a different perspective, their own priorities, their own take on what needs to be done and how it will be done. If you don't expose these differing viewpoints and arrive at a common understanding, the leadership is *unlikely* to pull together in the same direction using the same tactics. StratSnap exposes these different viewpoints in a way that is non-judgemental. No idea is thrown away but the best ideas percolate to the top and everyone feels they have been heard—because they *have* been heard.

With Dr Robertson facilitating, we ran a StratSnap workshop with the IT organisation. By this time, I had been appointed acting director and had a mandate to develop and execute a plan. I won't go into more detail, because I want to do that with the next organisation I led (see below). But after two years, we had reduced IT's risk rating from most critical organisational risk to 5th highest risk.

Late in 2008 I was appointed to lead the IT unit at a large privately-owned crop seed company. The IT organisation suffered from several dysfunctions which needed urgent attention. In early 2009, Dr Robertson facilitated both StratSnap and StratGap workshops for IT. At the first workshop, the team identified a set of seven critical issues that were negatively impacting the unit. We went on to distil seven key performance areas for the IT organisation. Each factor was weighted for criticality with 100 points spread over the set of 7 factors. We reached consensus at 25% for "Reliable, aligned, sustainable systems" and 20% for "Risk and downside containment". Hard technology was weighted 5%, not a burning issue. The other 5 factors made up the remaining 50%.

Next we each independently scored the KPAs using a scale from 0 to 10. We each gave a historic score: where were we 3 years ago? We each gave a current score. And critically, we each gave a target score—where do we need to be in 3 years' time? We could have picked one-year or two-year time horizons, but the business wanted a 3-year plan. Now inevitably, there was a range of weights and scores among the delegates, and herein lies the strength the StratSnap process: each delegate gets to explain their thinking in assigning their scores. The ensuing debate surfaces the full range of perspectives within the team. I found that this usually led to consensus within the team because the best arguments changed minds and moved scores. I recall that, on one or two factors some

disagreement remained. In one case I as the senior manager made an executive decision and asked the team to fall in line. In the other case I agreed to use an average figure that everyone could live with.

The upshot was that the IT team left the workshop with a common understanding: our ERP system needed the most attention, and we had to urgently address some key IT risks. Get these right and we're halfway there. We framed our KPAs and hung up the frame on the wall in the IT corridor. The weights were updated in January 2013 and again in June 2014. The KPAs we developed kept the team focused on the important stuff over a 5-year period. See the photo below.

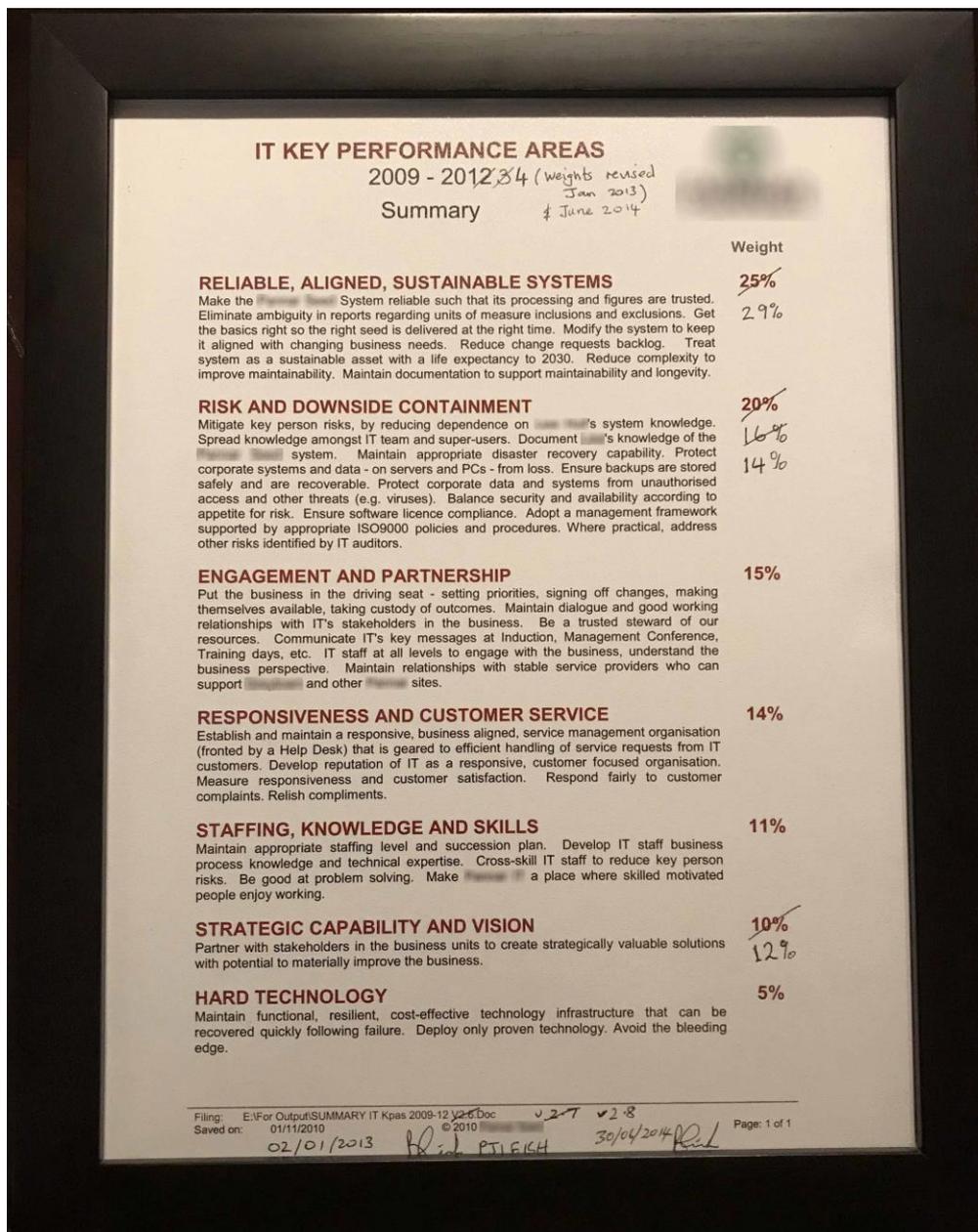


Figure 1 - Our KPAs from the StratSnap process

James Robertson's StratSnap Critical Issues Analysis – A simply brilliant process for reaching team consensus on what really matters. Testimonial from Paul Leigh, IT Business Partner, Corteva Agriscience (2009-2019)

At the beginning, we had a number of serious issues, so the weights were spread more evenly; but as time passed and we dealt with risk, the weight assigned to our ERP went up. Specifically, our risk weighting dropped from 20% to 16% and then to 14%. The ERP was harder to fix and that moved up from 25 to 29% as we grappled with its instability.

Now this StratSnap process was NOT done in isolation from the business leadership. Although I was not able to get leadership into our workshops, I did validate the weights and scores in conversations with senior leadership and key stakeholders. Some minor adjustments were made as a result. The StratSnap process generates a scorecard that I used with key stakeholders over five years. Here is a scorecard filled in by our quality manager in 2011.

IT Key Performance Areas -- 20010/11									
Weighting Question: How important is each KPA to me and my business area?									
Score Question: How well is IT accomplishing these objectives? 0= Could not be doing worse. 10=Best in the world.									
						Time Frame : 3 Years			
- these are the most important numbers						Score relative to How well are we accomplishing these objectives?			
No	KPA	KPA Scoring:	Rank (1 to 7)	Relative Weight (Out of 100%)	2008 Historic Score (0 to 10)	Apr-11 Current Score (0 to 10)	2014 Forecast Score (0 to 10)	2014 Objective Score (0 to 10)	
1	RELIABLE, ALIGNED, SUSTAINABLE SYSTEMS: Make the System reliable such that its processing and figures are trusted. Eliminate ambiguity in reports regarding units of measure inclusions and exclusions. Get the basics right so the right seed is delivered at the right time. Modify the system to keep it aligned with changing business needs. Reduce change requests backlog. Treat system as a sustainable asset with a life expectancy to 2030. Reduce complexity to improve maintainability. Maintain documentation to support maintainability and longevity.		1	25		6	8	8	
2	RISK AND DOWNSIDE CONTAINMENT: Mitigate key person risks, by reducing dependence on individual's system knowledge. Spread knowledge amongst IT team and super-users. Document individual's knowledge of the system. Maintain appropriate disaster recovery capability. Protect corporate systems and data - on servers and PCs - from loss. Ensure backups are stored safely and are recoverable. Protect corporate data and systems from unauthorised access and other threats (e.g. viruses). Balance security and availability according to appetite for risk. Ensure software licence compliance. Adopt a management framework supported by appropriate ISO9000 policies and procedures. Where practical, address other risks identified by IT auditors.		6	6		4	6	8	
3	ENGAGEMENT AND PARTNERSHIP: Put the business in the driving seat - setting priorities, signing off changes, making themselves available, taking custody of outcomes. Maintain dialogue and good working relationships with IT's stakeholders in the business. Be a trusted steward of our resources. Communicate IT's key messages at induction, management conference, training days, etc. IT staff at all levels to engage with the business, understand the business perspective. Maintain relationships with stable service providers who can support and other sites.		3	18		6	8	8	
4	RESPONSIVENESS AND CUSTOMER SERVICE: Establish and maintain a responsive, business aligned, service management organisation (fronted by a Help Desk) that is geared to efficient handling of service requests from IT customers. Develop reputation of IT as a responsive, customer focused organisation. Measure responsiveness and customer satisfaction. Respond fairly to customer complaints. Relish compliments.		2	20		8	9	9	
5	STAFFING, KNOWLEDGE AND SKILLS: Maintain appropriate staffing level and succession plan. Develop business knowledge of IT staff as well as technical expertise. Cross-skill IT staff to reduce key person risks. Be good at problem solving. Make Penner IT a place where skilled motivated people enjoy working.		5	11		6	8	8	
6	STRATEGIC CAPABILITY AND VISION: Partner with stakeholders in the business units to create strategically valuable solutions with potential to materially improve the business.		7	5		6	8	8	
7	HARD TECHNOLOGY: Maintain functional, resilient, cost-effective technology infrastructure that can be recovered quickly following failure. Deploy only proven technology. Avoid the bleeding edge.		4	15		7	8	8	
TOTAL					0%	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

Must add up to 100% =>

Refer to process guidelines for more guidance on completing this worksheet

Scores are between 0 and 10
 0 = Could not be worse
 10 = Could not be better

Stakeholders were asked to weight the 7 factors and score them—history, current and target. These scorecards served two purposes: 1) they formed the basis of a conversation with the stakeholder as

to why he or she scored and weighted the factors the way they did. It allowed me to spot where different managers had very different perspectives and try to reconcile them. 2) the scorecards gave me a longitudinal survey of IT performance over the five-year period. Were we getting better? Were we focussing on the right issues? Had business priorities changed?

StratGap

I haven't yet explained StratGap. So, the day after the original StratSnap workshop, Dr Robertson facilitated a StratGap workshop with the same group. The purpose of this session was to take the weighted and scored KPAs from the StratSnap and do a gap analysis. Once we knew how big the gaps were and how they weighted and scored, we were able to develop an actionable plan to close the gaps—beginning with the items whose combined weight and score were the highest. The beauty of this process is that everything is quantified using weights and scores from the same team that has to deliver the outcomes. StratGap becomes a powerful tool for resolving differences and focussing attention.

Conclusion

Dr Robertson's StratSnap and StratGap workshops were transformative for our IT organisation. StratSnap enabled the team to reach consensus on what our critical problems were, and on a plan of approach to addressing them. StratSnap ensured that we quantified our thinking and thrashed out our differences. It provided a basis for year-on-year performance measurement as perceived by key stakeholders including business leadership. The metrics also gave us a lever to ask for resources to move the needle, very helpful during the budgeting cycle.

When the company was acquired in 2013 by a large US conglomerate, our framed KPAs hanging on the wall made quite an impression; they'd never seen IT do this before.