# What IS Professionals Do

A Case Study of a Strategic Planning Presentation

### PROPOSAL TO

Your Firm for

Strategic Business Planning
Strategic Information Technology Planning
Information Technology Implementation Planning

September 2xxx

### What does Your Firm want?

### From business planning

- Reusable process producing implementable strategies & plans
- Direction & strategies permitting Your Firm to:

Earn a fair return for stockholders while maintaining social responsibility contributing to national development

eq. High productivity with high ethics

Retain & develop quality staff

eq. High morale with good career pathing

Achieve a competitive advantage through effective planning

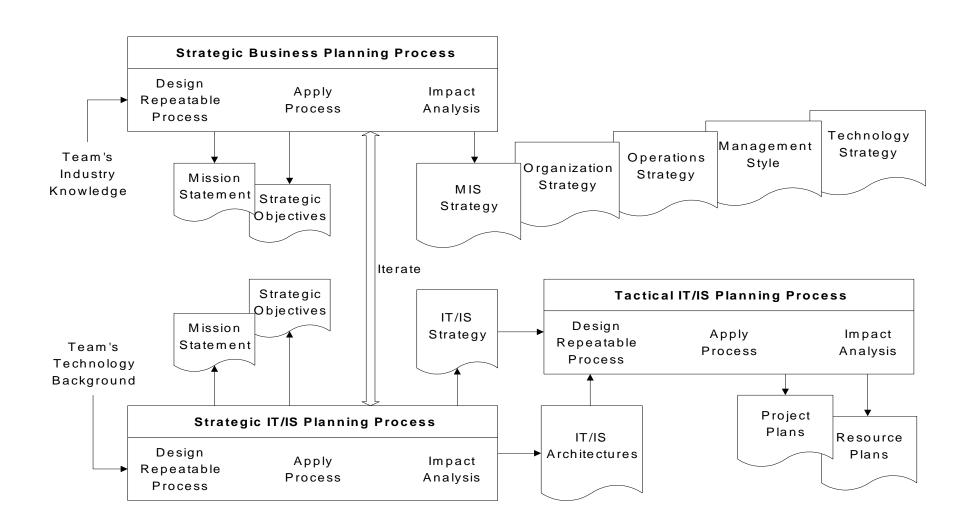
### From IT planning

- Reusable process producing implementable strategies & plans
- Direction & strategies permitting Your Firm to:

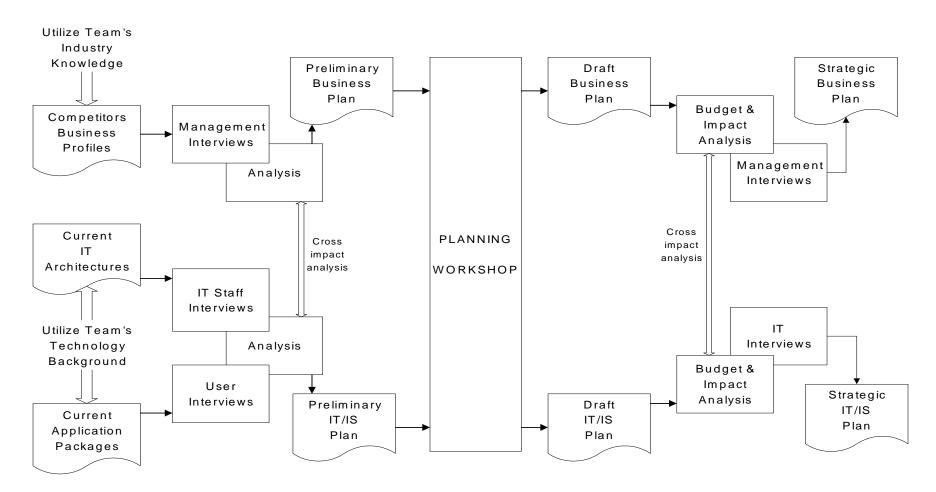
Ensure that information systems effectively support operations & management

Ensure that IT investments are efficiently spent Use IT for competitive advantage

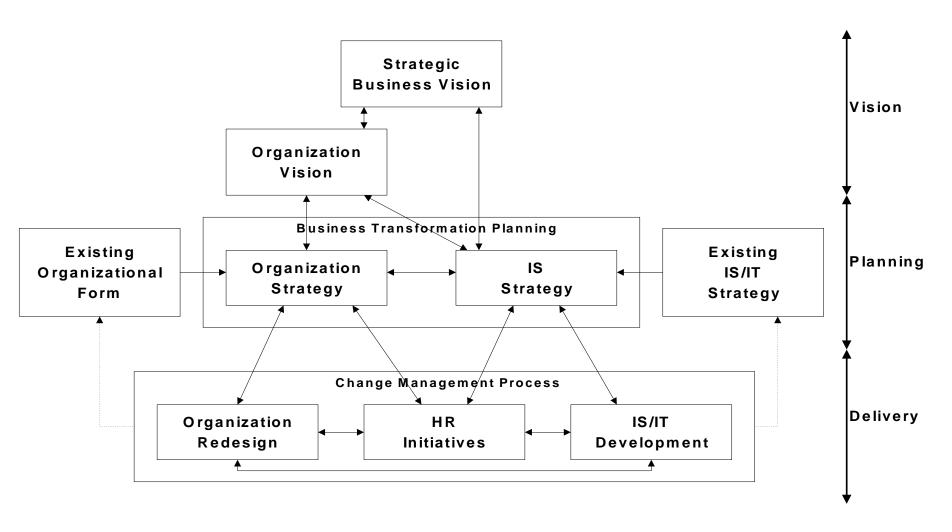
### Integrated Business and IT Strategic Planning Process



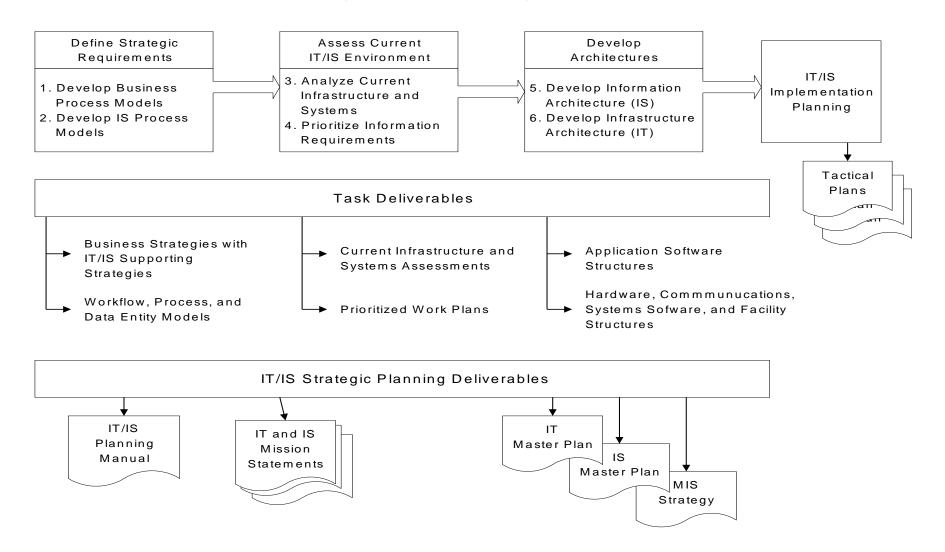
#### Producing an Integrated Business/IT Strategic Plan



### Strategic Business Planning (Transformation) Framework



# Information Technology Strategic Planning Process



# What are Your Firms Technology & Resource Capabilities

- Effective implementation of deposit transaction processing (however lengthy & expensive)
- Effective & efficient implementation of ATM processing
- Partial financial system implementation
- Current 1960/70's technology utilization approach not adequate for 1980's (do it yourself in COBOL)

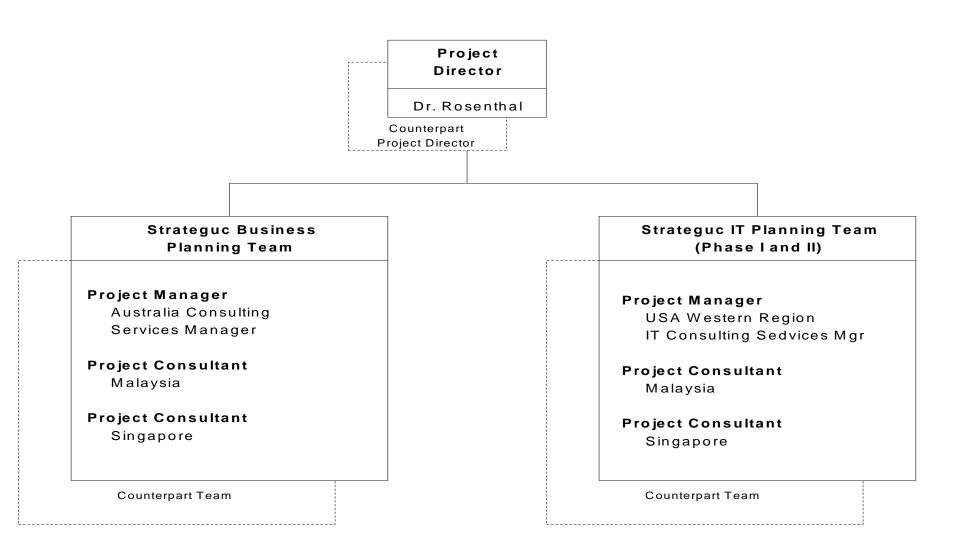
### How Can Your Firm Implement the Required New Applications

	2006	2007	2008	2009	2010
Current Deposit System Operation					- 4
Financial Package Implementation	-				
Loan Package Implementation		-		-	
Deposit Package Implementation			-		

#### Proposed Strategic Planning Project Plan

	October	November	December	January	Proj Dir	Proj Mgt	Proj Const	FEES
Business Planning					3	4	10	\$128,000
IT Planning					3	3	10	120,000
Implementation Planning					2	5	12	136,000
Person Weeks Totals			8	12	32	\$384,000		

### Project Staffing Plan



## **Typical Strategic Planning Clients**

- CITICORP
  - SECURITY PACIFIC BANK
    - BANK OF AMERICA
      - WESTPAC TRADING & SAVINGS BANK
        - ASIAN DEVELOPMENT BANK
          - STATE BANK OF NEW SOUTH WALES
            - OVERSEAS UNION BANK
              - SOUTHERN BANK
                - MALAYAN BANKING
                  - KEWANGAN BUMIPUTRA BHL

### WHY C& L?

HIGHLY EXPERIENCED. PRODUCTIVE & RESULTS ORIENTED PROJECT TEAMS

- UNITED STATES EXPERIENCE
- AUSTRALSAN & ASEAN EXPERIENCE
- MALAYSIAN EXPERIENCE

PROVEN STRATEGIC PLANNING METHODOLOGY

- BUSINESS STRATEGY
- SYSTEMS STRATEGY
- TECHNOLOGY STRATEGY

IMPLEMENTATION PROVEN PEOPLE, METHODOLOGY. AND ORGANISATION