Chapter 2

Business Planning Frameworks and IDCM

OVERVIEW

This chapter provides a synopsis of the contemporary business environment and reviews some internal and external factors that influence enterprise planning, with particular reference to document role. Several business sectors are considered. Some of the information systems and technologies available on the market to support planning initiatives are examined. The relevance of managing documents and their content is discussed in the context of a strategic planning framework that takes into account matters such as regulatory compliance and commercial processes.

Our view is that effective application of IDCM strategy cannot be undertaken unless attention is paid to the general context of an organization’s business processes and the IT environment in which they operate.

Our objectives are to do the following:

- Outline the enterprise business planning framework.
- Consider the commercial landscape and review some of the issues that may impact on business planning.
- Consider the regulatory landscape and review some of the legislative, administrative regulations, and standards that may impact on business planning.
- Reflect on the IT landscape and the implications for business planning.
- Discuss at a conceptual level the role of document management systems as a key enabler of business planning.
- Consider the overall implications of fragmented and mismanaged document environments on business planning.
BUSINESS PLANNING

Business and government enterprises generally embrace a planning framework that represents three tiers:

- The first tier is a Strategic Plan or similar document that defines the enterprise’s long-term vision, strategies, key result areas, and performance measures, typically with a three- to five-year horizon.
- The second tier generally consists of Tactical Plans that are designed to give effect to the strategies identified in a Strategic Plan, with a mid-term horizon (say one to two years).
- The third tier represents Operational Plans that are aligned with the other tiers and that support the day-to-day activities of the organization.

The specific types of planning strategies developed by commercial and government organizations depend upon the particular nature of the business or administrative activity. For example, a legal practice may strive to earn and maintain a reputation as a leading provider of services, meet customer requirements, and improve profitability. In government enterprises, the general focus is to meet the statutory requirements imposed upon the organization, to operate efficiently, and to deliver services to customers, in this case the public, through innovative and responsive service delivery models.

In either case, the identified mission of the organization can be brought about through strategies that express what it intends to achieve over a relatively long term, and how it intends to go about it in the short term given the environmental, resource, and organizational constraints.

Document management may not be identified explicitly in strategic plans. However, enterprises that identify strategies relating to areas such as quality systems, process reengineering, customer relationship management, or knowledge management will find that effective operation of these must take into account document management.

Therefore, it is likely that tactical and operational plans concerning records and document systems need to be developed in order to provide a backbone for strategic planning. Planning for document management systems associated with workflow should help to accomplish this.

COMMERCIAL LANDSCAPE

Today’s commercial landscape represents a jungle in which the “survival of the fittest” principles apply without fear or favor to every type of business organization. The commercial scene is beleaguered with company takeovers, amalgamations (which in some cases are effectively takeovers), bankrupt businesses, and organizations struggling to compete in a volatile business world.

For example, at the turn of this century, we witnessed the demise of many start-up companies that had great ideas, typically embracing the Internet Web technology. However, with some exceptions, these so-called dot.com companies did not have the marketing, production, and distribution infrastructure to compete against more established companies with the same types of products.
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