

PLANNING FRAMEWORK

How EOS®-Aligned Teams Can Prepare
for Technology Initiatives.



Our project engagement model consists of:

QUALIFICATION → PLANNING → IMPLEMENTATION

Here we expand on the **PLANNING** phase to help EOS-run organizations determine if they're truly ready to move forward with a major initiative.



PHASE 2: PLANNING

This phase ensures organizational readiness by examining three key components: THE CURRENT STATE, DESIRED FUTURE STATE, and SOLUTION RESEARCH.

Current State

The Planning Phase is underscored by the importance of conducting a current state analysis, which serves as a foundational step in effective project planning. Business leaders often neglect this crucial phase, impacting alignment on the enterprise's present operational status and existing challenges.

Silos create barriers that result in gaps within organizational workflows, often unbeknownst to management, yet they have profound implications for overall efficiency. Disconnects in interdepartmental communications can exacerbate issues, leading to compounding inefficiencies over time.

Current state analysis involves mapping process flows and identifying inefficiencies rather than envisioning a future state. By achieving a comprehensive grasp of the present circumstances, stakeholders can align effectively, thus setting the groundwork for meaningful improvements in the organization.

Desired Future State

The desired future state: A critical step requires organizations to prioritize identified process and system issues based on their business impact. Addressing the most critical issues first ensures resources are allocated effectively and that efforts are concentrated where they can yield the greatest benefit.

After prioritization, organizations must articulate detailed system and process requirements needed to attain the desired future state. This process is essential for aligning changes with strategic business objectives and addressing existing shortcomings identified during the current state analysis.

Solution Research

With a clear vision of the desired future state in place, organizations are tasked with researching potential solutions and vendors that can meet their specified requirements. Infante outlines the importance of leveraging industry insights, exploring available solutions, and considering emerging technologies and best practices that resonate with future state objectives. Engaging with industry peers and reviewing case studies can offer valuable perspectives on successful implementations, guiding the selection of potential vendors.

This approach lays the groundwork for developing informed criteria for vendor selection and requests for proposals (RFPs), facilitating an effective partnership that enhances the organization's strategic goals and operational performance.



Summary

This is a thorough exploration of the planning stage within the Compass Left Solution Lifecycle. For all of our projects we complete a current state analysis, addressing organizational silos, defining the desired future state, and conducting diligent solution research offer a comprehensive framework for organizations aiming to navigate their transformation processes effectively.

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