

INTERNAL SERVICES GROUP STRATEGY & PLANNING

Working Session Planning and Groundwork Phase

This phase establishes the framework by which a group charter and strategic priorities can be shaped.

- consider the required inputs and desired outputs from the session
- establish templates for gathering information during the meeting
- identify key planning activities and facilitation techniques for the meeting
- prepare a framework for identifying, agreeing to and documenting key action steps and responsibilities at the conclusion of the working session

Working Session Facilitation Phase

Gather group leadership, sponsorship, and any needed subject matter experts for a strategy planning working session (1 to 3 days duration):

- design a charter for the internal services group activities
 - agree on key strategic objectives that support business needs
 - identify and prioritize necessary internal services initiatives
- engage business and subject matter experts to lead targeted topic discussions as needed to better understand group business case
- contribute to the collection of information, issues, and agreed actions
- coordinate the identification of programs, projects, and sub teams, and plan the division and allocation of work needed to accomplish the near and long term objectives of the group

Sponsor & Leadership Sign-off Phase

Analyze, summarize and disseminate the outcomes of the strategy working session to participants and the Leadership Team. Outputs should include:

- presentation of strategic recommendations for the internal services group's work
- Journey map of initiatives arranged across 26 month timeline
 - Master List of the group's initiatives, including assessment of criticality, and current status (e.g., in progress, planned but not started, aspiration)

Program Management Phase

To ensure delivery on the group's value proposition, program and portfolio management is necessary. Many groups that coordinate work across several regions / divisions find a Program Management Office (PMO) most effective to advance their initiatives, maintain coordination across dependant work, and optimize resource usage. Once implemented, the PMO provides a continuous feedback loop wherein projects are prioritized, resourced, launched, planned, measured by standard project management standards, and adjusted as needed to address risks/issues/dependencies/etc. The PMO includes standard processes, frameworks/templates, and training for PMO resources to:

- guide stakeholder collaboration through clearly defined program and project management roles and responsibilities
- maintain a project "portfolio" that aligns to leadership objectives
- reinforce communication through uniform reporting and regular updates
- align project resources based upon capabilities and organizational needs
- maintain project scorecards / program dashboards as needed to track progress against specific activity and output measures