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# CREATING A BUSINESS & IT STRATEGY ROADMAP FROM THE GROUND UP

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Over the last several years ResultWorks has been involved in developing numerous strategy roadmaps for diverse groups in Life Sciences from research to pre-clinical and clinical development to manufacturing for traditional pharmaceutical, biopharmaceutical, and vaccines businesses. While the objectives and the environments vary widely across companies, our approach to developing a business and IT strategy roadmap has been applied consistently. That approach is framed in ten steps as follows:

1. Establish business objectives
2. Scope the effort
3. Build the right team
4. Define the current environment
5. Agree on the future environment
6. Develop a gap analysis
7. Draft a roadmap
8. Refine and align the roadmap
9. Formalize the roadmap
10. Revisit the roadmap periodically.

## Business Objectives

Businesses function best when they can stay focused on the big-picture of the organization. What are the goals: throughput, compliance, doubling productivity, or perhaps end-to-end information flow? Asking an organization to double productivity elicits a much different response than merely asking for a 10% increase in productivity. Another recent goal from some groups has been “versatility” since it is not uncommon to hear strategies to outsource almost any element of a

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pharmaceutical company's operation. The strategy, the supporting roadmap, and the investment will be very different depending on the breadth and depth of the demands on the business.

## Scope the Effort

The goal of getting a laboratory up and running is quite different than integrating that laboratory into the end-to-end workflow of an entire R&D organization. Taking too narrow a vision likely ensures that decisions and investments are made for the short-term and these will have to be revisited as the needs of the broader organization are considered. Thinking big but starting small has great advantages especially when constructing a strategy roadmap that plans several years out while implementing the highest priority needs first.

## The Right Team

Engaging the right members and building a collaborative team is critical to the success of strategic projects. Senior leadership, commitment, and communication is the cornerstone of that team. They set the tone for the importance of the strategy and clear the obstacles to success so that the objectives can be achieved.

The team needs to be cross-functional to speak for and make decisions throughout the project as trade-offs arise. The best team members are often the busiest and most involved people, so the right level of participation needs to be struck so that “day jobs” can still be performed. A solid project management approach will facilitate this need.

## Current Environment

Understanding and documenting the current environment is almost always required. There are some organizations where there really is no process but rather work efforts are open to individual preference. This is more often the case in smaller, growing organizations. Typically though, there are some processes and technology that are working well. Other work flows and systems may be suspect or even hindrances to meeting newly defined goals. Analyzing the current environment establishes a baseline while uncovering issues in need of better solu-

tions that will propel the organization forward.

## Future Environment

Determining the desired future state requires some vision and creativity. End-to-end processes should be considered. “What-if” challenges to the team should be routine. Benchmarks against other best-in-class organizations should be weighed.

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This is the “think big” part of the project that will stretch the organization to reach well beyond the current state.

## Gap Analysis

The gap analysis defines the delta between the current and the future environment. It accounts for the work effort and the investment needed to change from the current processes, technology, and organization to the desired future end-to-end processes, integrated technology, and a high performing organization. The outcome of the gap analysis is a list of projects needed to “close the gap” between the “as-is” and “to-be” states of the organization.

## Draft Roadmap

The projects defined by the gap analysis must then be prioritized and categorized. Typically it is best if the business participates in the activity by prioritizing (A, B, C...) and also by stack ranking the projects (A1, A2, A3...) so that not everything winds up as a priority “A1” project.

In addition to the prioritization, there will also be some natural order to projects so that the work and benefits flow in an or-

## Project Identification & Prioritization



Project	Type	Category	Summary Description	Priority (A, B, C)	Stack Rank
1	Strategic	Process	Baseline harmonization on high level standard global processes for preformulation, non-GLP, GLP and GMP formulation and analytical (not tied to organization changes) as required for global knowledge management	A	1
7	Foundation	Technical	Define and implement common information (business object) model	A	2
19	Foundation	Technical	Define requirements for database "A"	A	3
8	Strategic	Standards	Establish controlled vocabularies (what vocabularies, what systems will be impacted, how to communicate and maintain vocabularies)	A	5
3	Strategic	Process	Establish agreed global processes for unique identifier assignments	A	6
18	Strategic	Process	Determine how building blocks will be handled (separate Db or not) and what data needs to be captured.	A	7
27	Strategic	Process	Define requirements for summary and interpretive data collection and reporting	A	8
13	Foundation	Technical	Lab notebook data capture - workflow analysis and harmonization, requirements definition, solution selection and implementation approach (e.g. to phase or not to phase, data migration strategy)	A	9
40	Tactical	Technical	Capture general "know how" information in a structured manner (e.g., dept strategies, organization info, science strategies, best practices, lessons learned, etc.)	A	10
32	Strategic	Process	Define strategy for user interface to required data supporting internal and external collaboration (portal), search and retrieval, data presentation, summary reporting, helper services (e.g., load of external data to data stores), other supporting services	A	11

Projects are prioritized in terms of Strategic, Foundation & Tactical Projects

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As the business changes and adapts, objectives will change, and the roadmap must be revised to support the business. At least once a year, typically in the planning cycle, the organization should revisit the roadmap and make adjustments as necessary.

### Conclusions

If done well, the effort to develop a strategy roadmap will provide a vehicle to link business objectives and business strategies to a well defined set of projects to achieve those objectives. By engaging stakeholders from across the business, it will also facilitate collaboration among the functional areas of the organization as they build and align around the roadmap from the ground up. Downstream, the strategy roadmap will provide a common reference for on-going decision-making around projects as it supports evolving business objectives.

cheestrated way. The draft roadmap emerges out of this exercise.

### Refine and Align

Organizational buy-in to the roadmap is as important as the roadmap itself. The functional business organizations deserve an opportunity to provide input to the

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roadmap. Informatics/IT organizations need to weigh in on implications and impacts. In the end, it is important that all stakeholders are aligned with the recommendations.

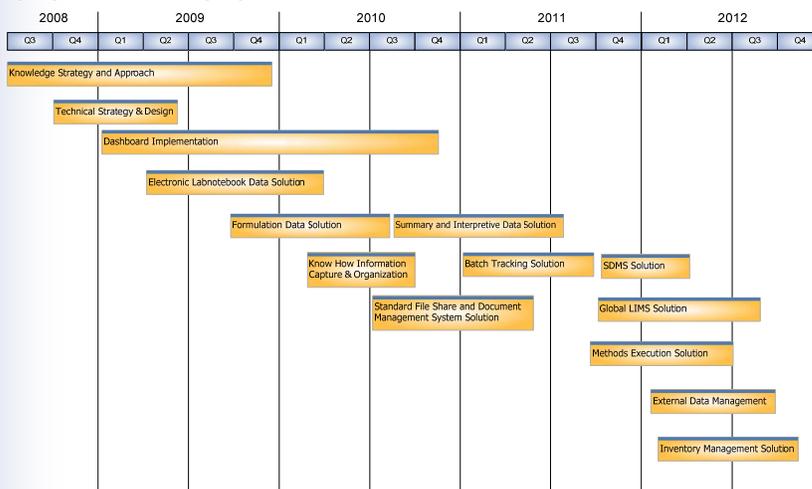
### Formalize the Roadmap

Once the stakeholders are aligned around the roadmap, the leadership team needs to confirm that the roadmap supports the business objectives. Assuming all the right work

has been done, the roadmap should be formalized through organization-wide communication. This should include commitment to the first year projects reflected in the strategy roadmap.

### Revisit the Roadmap

## Strategy Roadmap (Top Level Example)



Strategy roadmap reflects the company's business priorities and projects to achieve the business objectives