PROJECT SCOPE

Best Practices in Strategic Planning to Drive Organizational Agility

Organizational agility is defined as the ability to identify opportunities and risk quickly and execute on the opportunities and risks that align with the organization's overall strategy. The COVID-19 pandemic has been a wake-up call that organizations need to ensure their organization for the next black swan event and bolster the flexibility of their decision-making practices and responsiveness to the implementation of new initiatives.

Hence, APQC is conducting a research project to identify the key characteristics that drive organizational agility.

WHO IS THE AUDIENCE?

Corporate strategy, strategy analysts, C-Suite, business continuity teams, general managers, department heads

RESEARCH METHODS

This project will combine a survey with interviews to understand the how agile organizations are, what measures organizations should use to monitor agility, and what are the strategic planning and implementation practices that drive agility.

RESEARCH QUESTIONS?

The survey will focus on two main sections:

1. **Organizational agility.** Measure organization's agility on a spectrum of two capabilities:
    a. **Strategic responsiveness**—ability to sense/identify new risks and opportunities and respond to them quickly.
        i. Use objective measures to assess this component (e.g., network efficiency, number of new ideas, ratio of ideas to new initiatives)
    b. **Organizational flexibility**—the ability to shift execution rapidly. This includes the company's ability to put in place or adjust processes, organizational structure, resources, and systems to take advantage of new risks or opportunities quickly.
        i. Use objective measures to assess this component (e.g., resource mobilization cycle time, information access, decision rights by level)
2. **Strategic Planning.** Understand the strategic planning and implementation practices and behaviors that drive agility.
    a. **Strategic planning activities**—who is involved, what methods do they use (scenario, vision-based, SWOT, Porter's Five Forces, Balanced Scorecard,

sensitivity analysis, etc.), typical timeline and mix of their strategic initiatives (e.g., long-term versus short-term), how often do they conduct formal strategic planning or adjust the plan (rolling calendar, yearly plan, etc.), resource allocation practices. Do they use the same framework for division and business unit planning as corporate and how they are tied together?

b. **Internal analysis**—what methods do they use, how often do they assess this information, top KPIs, what areas are important for decisions making (operational, process, people, financials, etc.), who is responsible, etc.

c. **External analysi**s—what methods do they use, how often do they assess this information, top KPIs, what areas are they tracking (customer, market, competition, environment, political, social, etc.), who is responsible, etc.

d. **Implementation practices**—who is responsible, tracking methods, KPIs, how often do they assess implementation, etc.

RESEARCH APPROACH AND DELIVERABLES

Plan
- Frame the research questions and approach
- Conduct background research to refine the research questions, understand the pain points, identify potential case study candidates

Collect
- Analyze quantitative and qualitative data, conduct any validation needed
- Refine the data collection audience
- Design the survey
- Conduct interviews with case study participants and SMEs in topic area
- Collect secondary research on digital transformation sub-topics

Analyze
- Analyze quantitative and qualitative data, conduct any validation needed
- Look for patterns, insights, and trends
- Identify themes and best practices across interview participants

Report
- Survey summary report
- White paper(s) on trends in execution and best practices
- Infographics
- Case studies
- Articles discussing subtopics
- Webinar

♦   Blog posts and PR articles

ABOUT APQC

APQC helps organizations work smarter, faster, and with greater confidence. It is the world's foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management. APQC's unique structure as a member-based nonprofit makes it a differentiator in the marketplace. APQC partners with more than 500 member organizations worldwide in all industries. With more than 40 years of experience, APQC remains the world's leader in transforming organizations. Visit us at www.apqc.org, and learn how you can make best practices your practices.