

Introduction

PulsePlanning® facilitates the development and execution of Strategic and Operational Plans. Its purpose is to enable clients:

- Develop a Strategic planning systems that delivers accountable and measurable linkages between stakeholder aspirations, financial capacity and practical service delivery.
- Facilitate financial planning that accurately demonstrates the organisation's capacity to deliver services and manage assets that ensures sustainability into the future.
- Ensure effective asset management with the rigour of process and integrity of data to accurately reflect true asset management costs.

The Planning framework used in PulsePlanning can be customised by the client to reflect the priorities in the business together the methodologies and policies that must be followed.

Planning Framework

In its native form, the planning framework enables the development of high level strategic themes or priorities which can be used to provide a high level narrative for the development of strategic Objectives. Typically these 'themes' are outward looking to the market or community that is being served by the organisation.

The plan can be further subdivided using internal perspectives to breakdown silo thinking and ensure the entire organisation is focussed on contributing from their frame of reference to strategic objectives that satisfy customer or community outcomes

A PulsePlanning **Strategy Map** facilitates this planning process in a highly visual manner to enable an holistic understanding of the plan rapidly and easily. Strategy Maps also make the planning process easier and fun!

Figure 1: Example of a Strategy Map

A PulsePlanning® Strategy Map describes the value chain across the organisation in terms of the strategic objectives that must be satisfied to deliver on customer and/or community outcomes.



Strategy Map

Strategy Maps are highly configurable to any organisation or planning situation. Planners can literally draw the plan on a page and create linkages between objectives to highlight the cause and effect relationship between them in different plan perspectives across plan themes. A completed strategy map will succinctly describe the purpose of the organisation and enable all departments and employees in those departments to identify where their contributions count towards the plan.

Strategy Maps can be cascaded across and down the organisation. For instance a division or department can be assigned responsibility for one or more strategic objectives on a corporate

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map for further planning in a separate strategy Map that links to the Corporate Map. This enables planning to be cascaded across and down an organisation using a 'line of sight' approach.

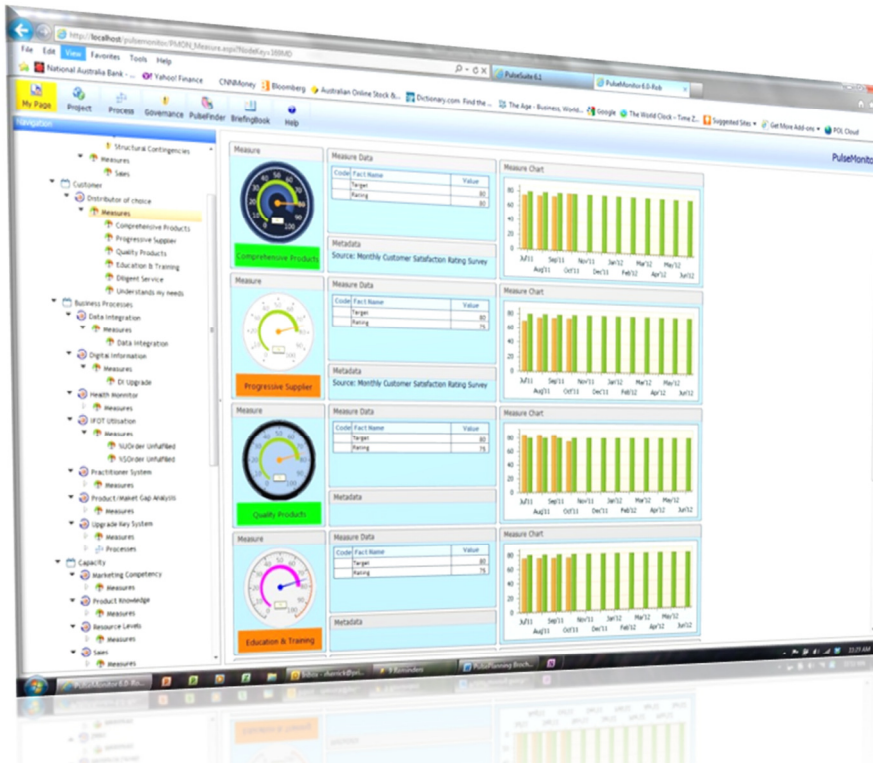
Performance Measures

Objectives in plans can be measured by creating performance measures which are linked to the objective. Any type or form of measure can be created and linked to any form of quantitative or qualitative data from any system within the organisation. Indeed the facts within a measure can be sourced from totally different systems. For instance, budget information can be sourced in real time from a spread sheet whilst actual

expense is source from the finance system. If this measure is represented in a gauge it means the gauge is presenting data from two different sources.

Once measures have been created they are automatically updated from their data source, typically every night.

Measures can be represented by a number of different formats including, dials, gauges, charts tables etc. and can be presented in dashboard format. Business rules can be developed to provide automated alerts for any measure.



These rules can be created using a:

- simple comparison of facts e.g., Actual Expense to Budget
- simple comparison of a fact to a fixed limit e.g., E Coli levels compared to a threshold
- combination of facts in a Boolean relationship e.g., Programme Cost to budget and programme completion

The alert outcomes of each measure can be normalised and rolled up to the Objective level to provide an overall assessment of the performance in the objective. This process makes use of weights to increase or decrease the impact of individual measures upon the objectives performance. This enables a performance roll up assessment even when the measures use:

- qualitative and quantitative data
- Leading and Lagging data
- Factual and subjective data
- Data based on different units of measure e.g., time data with cost data
- A combination of all the above

The rolled up alerts on measures create alerts for objectives which can in turn be rolled up to provide alerts for strategic themes or priorities or internal perspectives. Indeed the entire plan can be rolled up to generate an alert for a plan

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Plan Metadata

As a plan is developed the metadata is captured in across all elements of the strategy map, including:

- Vision, Values
- Mission
- Theme description
- Perspective description
- Objective Description
- Measure description
- Fact Description
- Business Rules Description

Descriptive content is narrated using the Kipling maxim, What, Why, When, Where, Who and How.

Plan Execution

Execution of the plan is facilitated by the integration of other PulseSuite® modules:

- PulseProject®
- PulseGovernance®
- PulseProcess®
- PulseWorkFlow®
- PulseMonitor®
- PulseFinder®
- PulseContract™

The objectives defined in a plan need to have work done on them to achieve the results required. This is facilitated by enabling the work to be defined within the plan e.g., Projects can be defined for an objective. Then the related PulseSuite® application can be accessed to prepare the work required in more detail. For instance a project defined in PulsePlanning is automatically made available in PulseProject® for work up and approval according the rules and processes defined by the client in that application. Similar processes of work definition and assignment is possible with all other PulseSuite® applications to create and monitor work for:

- Tasks
- Projects
- Governance obligations
- Process tasks
- Etc.

As the plan has alerting capability **automated workflows** can be created using PulseWorkFlow® to automate work to attend to performance issues before they become major problems. Moreover since the work created in all PulseSuite® applications makes use of PulseWorkFlow® capability very early warning signals can be created for a plan.

For instance if a strategic objective concerns infrastructure development and that objective is linked to a programme of project work under a range of contracts then automated workflows can provide early warning processes for the plan objective based on alerts in the projects and or contracts. *"The Captain can now see the size of the iceberg hidden under the water and safely navigate around it"*

