



Integrated Planning linked to Expectations

Based on best practice Enterprise Modelling & Architecture principles

Table of Contents

| | |
|---|----------|
| Integrated Planning linked to Expectations | 1 |
| Introduction..... | 3 |
| Integrated Planning linked to Expectations | 3 |
| How to use Integrated Planning linked to Expectations..... | 3 |
| Use of Copyrighted Material..... | 6 |

Introduction

Integrated Planning is a complex subject, where it interlinks with multiple components within the organization. In order to capture the expectations related to Integrated Planning, the Integrated Planning linked to Expectations is built as a matrix. The matrix is a representation that shows the relationship of captured information between specific decomposed and/or composed expectations and planning objects. The core idea of an Integrated Planning linked to Expectations Matrix is that it typically consists of expectation aspects in a list of columns, and another aspect is a set of Integrated Planning columns (taken from the map), while the third and final aspect being the cross product between the rows and the columns.

This allows for the Integrated Planning linked to Expectations Matrix to relate (un)familiar objects to familiar objects in the different layers of an enterprise (composition discipline), usually in the form of a diagram, a table or a chart (e.g. rows and columns), thereby outlining direct (and possibly indirect) connection points between different kinds of objects while showing a common pattern of the objects and the relationship between them.

Integrated Planning linked to Expectations

The Integrated Planning linked to Expectations Matrix provides you with a detailed overview of the cross relationships between expectations and the plans (each identified with a unique name and ID number) that has been identified through the Integrated Planning Map, and then associated with the identified external and/or internal forces and drivers, strategies, objectives, risks and organizations.

How to use Integrated Planning linked to Expectations

Identify, document and relate expectations to the plans (each identified with a unique name and ID number), external and/or internal forces and drivers, strategies, objectives, risks and organizations.

For example:

1. An expectation may have multiple yet specific associations with plans, external and/or internal forces and drivers, strategies, objectives, risks and organizations.
2. Multiple expectations may have an association to any single specific plan, external and/or internal force and driver, strategy, objective, risk and organization.

| What (What are the expectations around planning) | What | | Why | | Which | Where | |
|---|--------|------------------------------------|-------------------|----------|-----------|-------|--------------|
| | Plan # | Force (competitive positioning) | Driver (focus) | Strategy | Objective | Risk | Organization |
| Expectation 1 | # | | | | | | |
| Expectation 2 | # | | | | | | |
| Expectation N | # | | | | | | |

Table 1: Integrated Planning linked to Expectations.

Please note that the objects we have listed here are the most typical components that are commonly used within an Integrated Planning linked to Expectations Matrix, but there may be more (or fewer) relevant aspects that are used within your organization. If that is the case, feel free to either add new ones, or remove any objects that are not relevant, or are otherwise unimportant, for this particular matrix.

Also note that the objects might have a different name in your organization, so make sure to adapt the objects of this artefact so that it fits to the taxonomy of your organization.

The objects involved with Integrated Planning linked to Expectations is shown in table 2.









| Objects used within Integrated Planning linked to Expectations | | |
|---|--|--|
| Notation | Name | Description |
|  | Plan | The notion of thinking about and organizing the tasks required to achieve a desired output. |
|  | Force | An external or internal factor that forces or pushes some aspect of an enterprise in a specific direction. |
|  | Driver | An external or internal factor that drives, establishes motivation for or influences the direction of an enterprise. |
|  | Strategy (Strategic Business Objectives) | The direction and ends to which the enterprise seeks as well as the means and methods by which the ends will be attained. |
|  | Objective | The purpose or target of one's efforts or actions. |
|  | Risk | The combined impact of any conditions or events, including those caused by uncertainty, change, hazards or other factors that can affect the potential for achieving objectives. |
|  | Organization | An arrangement or formation of resources that has a set of collective goals. |
|  | Expectation | The anticipated benefits that are of worth, importance, and significance to a specific stakeholder. |

Table 2: Objects typically associated with Integrated Planning linked to Expectations.

Use of Copyrighted Material

These guidelines apply to all uses of “LEADing Practice’s material” that are protected by copyright (which among other things includes all text, images, software, documentation, screenshots, web sites, photographs, video footage, etc.) (“LEADing Practice’s material”), in whatever media they may be used (including print media, online media, books, articles, audiovisual works, blogs, wikis, or any other format or medium).

“LEADing Practice’s material” refers to all information and material contained standards, products, software, website, frameworks, methods, approaches with associated descriptions, categorization, classification, semantics relationship, ontology, objects, artifacts, maps, matrix and models, in whatever media they may be used (including print media, online media, books, articles, audiovisual works, blogs, wikis, or any other format or medium).

“LEADing Practice’s material” is Intellectual Property (IP) of LEADing Practice ApS and protected by copyright and limitations apply to the reuse of this IP. The Intellectual Property Rights (IPR) consists of information, knowledge, objects, artifacts, experience, insight and/or ideas, that are structured to enable reuse to deliver value creation and realization.

The LEADing Practice ApS intellectual property is protected by law, including, but not limited to, internationally recognized United States and European Union IPR copyright law. Except as specifically indicated otherwise in writing, LEADing Practice ApS is the owner of the copyright in the entire “LEADing Practice’s material” and LEADing Practice ApS reserves all rights in that regard.

Use or misuse of the IPR, the trademarks, service marks or logos is expressly prohibited and may violate country, federal and state law. The following limited situation where use is permitted without LEADing Practice prior written permission.

These guidelines apply to all uses of “LEADing Practice’s material” that are protected by copyright (which among other things includes all text, images, software, documentation, screenshots, web sites, photographs, video footage, etc.) (“LEADing Practice’s material”), in whatever media they may be used (including print media, online media, books, articles, audiovisual works, blogs, wikis, or any other format or medium).

“LEADing Practice’s material” refers to all information and material contained standards, products, software, website, frameworks, methods, approaches with associated descriptions, categorization, classification, semantics relationship, ontology, Objects, artifacts, maps, matrix and models, in whatever media they may be used (including print media, online media, books, articles, audiovisual works, blogs, wikis, or any other format or medium).

“LEADing Practice’s material” is Intellectual Property (IP) of LEADing Practice ApS and protected by copyright and limitations apply to the reuse of this IP. The Intellectual Property Rights (IPR) consists of information, knowledge, objects, artifacts, experience, insight and/or ideas, that are structured to enable reuse to deliver value creation and realization.

The LEADing Practice ApS intellectual property is protected by law, including, but not limited to, internationally recognized United States and European Union IPR copyright law. Except as specifically indicated otherwise in writing, LEADing Practice ApS is the owner of the copyright

in the entire “LEADing Practice’s material” and LEADing Practice ApS reserves all rights in that regard.

Use or misuse of the IPR, the trademarks, service marks or logos is expressly prohibited and may violate country, federal and state law. The following limited situation where use is permitted without LEADing Practice prior written permission.

- The LEADing Practice materials and all copies shall remain at all times the exclusive property of LEADing Practice ApS.
- LEADing Practice material CAN NOT BE REPRODUCED, MODIFIED, COPIED, AGGREGATED, DISTRIBUTED, TRANSMITTED, DISPLAYED, PUBLISHED, LICENSED, TRANSFERRED OR CREATE DERIVATIVE WORKS OR SELL ANY INFORMATION YOU AGAIN ACCESS TO THROUGH LEADING PRACTICE.
- You must use the LEADing Practice Materials without modification (except as may be necessary to resize or otherwise convert the LEADing Practice material to a permitted format).
- You must include the copyright notice “© <YEAR>. LEADing Practice, Source: A part of Enterprise Standard” and possibly indicate the LEADing Practice work product family, such as “Part of the LEAD Business Model Reference Content. All rights reserved.” [Note: you should insert the year as shown on the materials that you are using].
- You may not use the LEADing Practice Material in any offensive manner or context, for example in a way that is defamatory, disparaging or libelous to, or otherwise presents false or misleading information regarding, LEADing Practice or any other party, or its or their products or services; in conjunction with obscene or pornographic material; in a manner that suggests bias based on race, national origin, gender, sexual orientation, or religion; or in any manner that would be illegal under applicable law.
- You may not imply any LEADing Practice partner, sponsorship, affiliation or endorsement.
- You may not use the LEADing Practice Material for a purpose competitive with LEADing Practice or its products unless otherwise clearly permitted by applicable law.
- You may not use the LEADing Practice corporate logo.
- No use of other LEADing Practice trademarks is granted under this section.

Third parties wishing to use “LEADing Practice’s material” that are protected by copyright must have LEADing Practice’s permission to do so. In some situations described below, LEADing Practice gives you that permission so long as you comply with the requirements stated. In others cases, you must obtain LEADing Practice’s written consent. If you don’t already have a contract with LEADing Practice that clearly gives you such rights, please contact LEADing Practice to request such permission.

LEADing Practice ApS may, in appropriate circumstances of infringement of the intellectual property rights pursue legal action. For questions, please get in touch with us.