



Integrated Planning linked to Business Rules

Based on best practice Enterprise Modelling & Architecture principles

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Introduction

Integrated Planning is a complex subject, where it interlinks with multiple components within the organization. In order to capture the business rules related to Integrated Planning, the Integrated Planning linked to Business Rules is built as a matrix. The matrix is a representation that shows the relationship of captured information between specific decomposed and/or composed business rules and planning objects. The core idea of an Integrated Planning linked to Business Rules Matrix is that it typically consists of business rule 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 Business Rules 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 Business Rules

The Integrated Planning linked to Business Rules Matrix provides you with a detailed overview of the cross relationships between business rules 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 Business Rules

Identify, document and relate business rules 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. A business rule may have multiple yet specific associations with plans, external and/or internal forces and drivers, strategies, objectives, risks and organizations.
2. Multiple business rules may have an association to any single specific plan, external and/or internal force and driver, strategy, objective, risk and organization.

What (What business rules are involved)	Plan #	What		Why		Which	Where
		Force (competitive positioning)	Driver (focus)	Strategy	Objective	Risk	Organization
Business Rule 1	#						
Business Rule 2	#						
Business Rule N	#						

Table 1: Integrated Planning linked to Business Rules.

Please note that the objects we have listed here are the most typical components that are commonly used within an Integrated Planning linked to Business Rules 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 Business Rules is shown in table 2.









Objects used within Integrated Planning linked to Business Rules		
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.
	Organizational Rule (business rule)	A statement that defines or constrains some aspect of behaviour within the enterprise and always resolves to either true or false.

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

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