

# Analysis Of Strategic Planning Assistance Tools

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**Abstract.** *Strategic Planning is an important part of an organisation's success, and since this presents an Achilles heel for many companies, appropriate tools can provide much needed assistance. In this paper, we address the field of Supporting Information Solutions in Strategic Planning. Analysis and presentation of tools to assist in Strategic Planning is included, and the main goal of the paper is to determine, which of the given tools is the most suitable. In order to make a comparison, we selected six tools, chosen based on the frequency of presence in the forums. We analysed the functionalities of the tools and, finally, compared their core properties, providing guidelines for future Strategic Planning activities.*

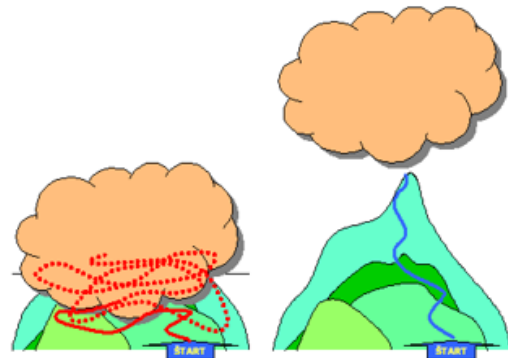
**Keywords.** Strategic Planning, performance indicators, strategic tools, control panel, organisation monitoring

## 1. Introduction

The goal of every organisation is to increase its profits, enhance the company's performance, and ensure customer satisfaction, as well as provide an employee-friendly work environment (Rozman & Stare, 2008). The paper's focus addresses the field of Strategic Planning and activities related to its creation, supporting the organisation's goals. Since the effort of an organisation is to stay competitive in the market, the appropriate Strategic Planning is very important, and many organisations are not aware of, or do not have enough knowledge to create an effective and appropriate strategic plan for their needs. Another problem is the failure to follow the outlined strategic plan, and organisations spend a lot of time obtaining a report in which they will gain insight if they follow the set paths and monitor their own performance. According to the listed problems, Information Technology (IT) solutions are a welcome and necessary addition to Strategic Planning activities.

A Strategic Plan is a formal definition of the business direction in which the company or organisation will focus (Janškovec, 2004). Different organisations have diverse goals while they strive for

business success, which opens several questions, e.g. how to support them while achieving defined goals. One of research interests in this paper is how to evaluate when an organisation is actually successful within its business activities. Since the situations in organisations change rapidly, they consequently need to react quickly and correctly, be flexible and responsive. It is important to check performance on an ongoing basis, while they must also set realistic goals and check the compliance of operations with the set goals. Since rapid and unexpected market changes bring many problems to unprepared organisations that hinder the achievement of strategic goals, these obstacles empower the companies' goals of efficient strategic planning and following the set plan. Organisations which have regulated control systems and take timely action, are more likely to be successful in the business world. Figure 1 presents a simplified example of the road to a mountain in the case of a good strategy plan (right) and an unappropriated one (left).



**Figure 1.** Example of a good and a bad strategy

In the following sections, the importance of Strategic Planning while supporting organisations needs will be presented, followed by strategic elements in section three. In Section four, the tools supporting organisations will be presented and compared in Section five. A conclusion and future work will be defined in Section 6.

## 2. Strategic Planning

Strategic Planning is organisational management. It sets priorities, focuses energy and resources, strengthens the organisation, and ensures that employees and other stakeholders work towards common goals by achieving a response to the intended results, evaluating, and adapting the organisation's direction in response to the changing environment. It is a disciplined effort that produces fundamental decisions and actions to shape and lead what an organisation is, who serves the organisation, what and why the organisation does it, and, above all, with a focus on the future. Strategic Planning that is effective, not only determines where the organisation is going, but also covers the actions needed to progress, and, at the same time, includes criteria for the organisation to know if it is at all successful (Taylor, 2020).

Strategic plan is a document used to communicate with the organisation regarding the goals, the measures needed to achieve the set goals, and all the elements that are crucial and were developed during the preparation of the strategic plan (Musek-Lešnik & Lešnik-Musek, 2016). The strategic plan generally covers the following sections:

- a summary, usually written at the end of the entire strategic planning process,
- description of the organization,
- the mission of the organisation, its vision and statements of value,
- strategic analysis, which can take the form of a SWOT analysis (covering strengths, weaknesses, opportunities and potential threats),
- explanation of the strategy and tactics for the organization,
- an action plan,
- organisation budget and operational plans,
- methods of monitoring and evaluating the performance of the organisation.

Creating a strategic plan depends largely on the very nature of the organisation. In the event that an organisation operates in a rapidly changing business environment, strategic planning is essential to the organisation's existence and usefulness, so that the organisation remains effective. The strategy planning or renewal is suggested in the following cases (Musek-Lešnik & Lešnik-Musek, 2016):

- when the organisation renews goals,
- when an organisation begins operations,
- in case the organisation is preparing for a new venture (example, a product launch),
- when markets begin to alternate and the business environment changes (business practices, regulations, laws).

By renewing Strategic plans, following the guidelines and the pyramid of concepts (Figure 2),

higher quality and support is provided for an organisation.



**Figure 2.** Pyramid of concepts for higher quality of organisation (Taylor, 2020)

## 3. Supporting organizations

Companies need to design and define what they want to become and how they will achieve their goals. For this purpose, they have to define several strategic elements:

1. The **vision** of an organisation is a general description of the projected future of the organization, and represents idealised future images. It predicts on what the organisation should focus in the future.
2. The **mission** of the organisation defines the meaning of existence or the purpose of the organisation itself. The centre of the organisation is its mission, and from this follows the companies' conduct. The mission, drawn up in the form of a generalised statement, should include all the basic concepts that describe the organisation concisely, its services, market, goals, philosophy (responsibilities of the organisation to its employees, users, society and, of course, the founders).
3. For organisations that want to be efficient and successful, they need not only a great product, but also a great **story** that adds value to products and services and attracts attention.
4. **Methods of the vision realisation.** The strategic underlying tool is a well thought out and clearly set goal that is integrated into a strategic plan (Musek-Lešnik & Lešnik-Musek, 2016).
5. **Tangible and measurable tasks** are set by organisations. The organisation must set goals so that they can be measured easily and quickly. In this way, the organisation determines its success in achieving its goals quickly. Effective goals are based on defined values, the mission and vision of the organisation. The purpose of the goals is to summarise the mission and vision and, thus, define the actions and procedures more on how to carry out both aspects successfully (Musek-Lešnik & Lešnik-Musek, 2016).

Support of tools while creating strategic plans and addressing strategic elements benefits organisations while performing their daily tasks and achieving their set goals.

## 4. Tools for Strategic Planning support

Based on a literature review, focusing also on commercial forums and business recommendations, the following tools for strategic planning were chosen:

- Cascade Strategy,
- Envisio,
- On Strategy,
- Planview,
- Bitrix24 and
- KPI Fire.

More details about the tools are provided in the following sections.

### 4.1 Cascade Strategy

The organisation was created in 2012 (the logo is presented in Figure 3) and the first version of the tool was created a year later. It is a strategic management platform, allowing the creation of a plan. The implementation of the plan in the company can then be monitored by using the control panel. In the event of a strategy change, the tool allows changes to be made at any time. The tool covers the central management of individual projects, objectives and key performance indicators - KPIs (Cascade, 2020).



Figure 3. Logo of the Cascade Strategic tool

The tool covers strategic planning, goal and project management, includes dashboards, reports, performance management, and human capital management. Cascade Strategy also contains a strategy-planning wizard and various visualisation templates that can be customised to the needs of the projects. Users can create and customise strategies and assign projects to individuals and set goals for them. Cascade Strategy Software has the ability to track various parts of projects, such as risks, issues, goals, and engagement.

### 4.2 Envisio

The Envisio tool was founded in 2012. The tool (the logo is presented in Figure 4) is designed to manage strategies in educational and governmental organisations. It offers a transparent interface for easy use. The interface includes data about the company's

performance, additionally enables the creation of reports for Boards of Directors or other leading services in organisations, so that the including parties can communicate about the progress. It allows the organisation to work with their team to customise the tool as much as possible for the needs of the organisation (Envisio, 2020).

Envisio is an online solution. For learning, it includes documentation and a so-called online classroom (Envisio, 2020). It also provides online support.



Figure 4. Logo of the Envisio strategic tool

### 4.3 On Strategy

OnStrategy Company was established in 2003 in the United States (the logo is presented in Figure 5). OnStrategy's biggest competitor right now is Envisio (OnStrategy, 2020). The main feature is communication with the client. They also advise the client and adapt the tool for the client with common ideas. The information solution covers the entire process of Strategic Planning, enables directing tasks to specific departments, transparent reports and tracking performance with the help of the control panel. It is an online solution, and covers training in the form of documentation, live online and personal support.



Figure 5. Logo of the OnStrategy strategic tool

### 4.4 Planview

Planview is an online solution that helps with Strategic Planning (Figure 6). The solution is intended primarily for industrial companies, where it covers functionalities for easier, faster and more efficient operation of the company. It is a flexible tool for a changing work environment. It includes a control panel so that leaders in the organisation or company can see the results quickly and easily, and take timely and correct action, thus avoiding possible inconveniences (Planview, 2020).



Figure 6. Logo of the Planview strategic tool

It is work and resource management software and covers comprehensive solutions for Strategic Planning, resource and product collection, capacity and technology management, and collaborative management. Software can help organisations create timelines, optimise funding, and allocate resources through strategic scenario planning. Also included are tools for financial and capital planning, analytics, and a control panel for an easier and faster overview of events.

The company's goal is to achieve the set strategy of the organisation with the service of all people, resources and business capabilities. The service includes:

- Strategic Planning,
- Portfolio and resource management,
- Product portfolio management,
- Capacity and technology management,
- Management of joint work.

#### 4.5 Bitrix24

Bitrix 24 (Figure 7) is a freely available tool for Strategic Planning, business intelligence and a project management platform. Tasks can be assigned to company employees through the tool. The chart can review the tasks and their status, the responsible person and the chronological relationship. This gives the user a complete picture of the projects (Bitrix, 2020).



**Figure 7.** Logo of the Bitrix24 strategic tool

Bitrix24 has various offers in terms of price range. These classes include various functionalities, such as number of users, online storage capacity, CRM functionality capture, marketing automation, options over tasks and projects, communications, websites and a contact centre.

#### 4.6 KPI Fire

KPI Fire was founded by Cedro Toro as a solution to a problem he had been facing for more than 15 years as an expert and consultant for Lean / Continuous Improvement. He found that most companies strive to communicate their strategic priorities with outdated x-metric spreadsheets, PDF documents, and slideshows. Cedro noted that strategic plans are often well-designed, but the organisation has not yet recognised them.

The solution is designed for a top-down strategy by generating bottom-up ideas. In the middle are selected

and activated projects for the implementation of strategic priorities.



**Figure 8.** Logo of the KPIFire strategic tool

It is a cloud-based tool, and suitable for all types of groups in manufacturing, service industries, healthcare and other organisations. KPI Fire is designed to help organisations align its teams, and achieve their goals in such a way that it provides users with the tools to enter their annual goals, strategic plans. The entered goals are then broken down into departmental goals, team goals, and projects.

KPI Fire project management allows users to plan and implement continuous project improvements, create workflows, perform tasks, and allows users to set up a workflow template for repetitive project types - automation.

It allows the user to create standardised workflows that help team members visualise their strategy, and ensure that all people are involved in achieving the same goal. Strategic goals can be created and defined with the help of KPI Fire, and then all users in the organisation get access or visibility of these goals in real time on the control panels. The custom forms contained in the tool enable the management of organisations to obtain ideas and suggestions from employees. Ideas can be prioritised, and later converted into feasible projects. All new projects and ideas that are created and implemented can be linked to the goals and easily measured regarding their effectiveness and significance. The logo is presented in Figure 8.

To compare all listed tools, a simple experiment was conducted, testing all tools and comparing their functionality, which is presented in the following Section.

## 5 Experiment

To compare all listed tools and provide a guide for potential users, we conducted a simple laboratory experiment. The experiment included testing the tools and comparing their functionalities. The experiment was performed in a laboratory environment (on a personal computer).

The idea of the experiment was to test the functionalities covered by the tools, and to determine the extent to which they cover Strategic Planning and plan implementation. Table 1 shows a comparison between the tools. The main functionalities were chosen based on the tools' functionalities and what is

perceived to be desirable for creating and implementing a Strategic Plan and they include:

- Idea generator,
- Strategy planning,
- Vision definition,
- Enter organisational value,
- Enter organisational goals,
- Entering of new projects,
- Project charter,
- Indicators of success,
- Dashboard,
- Creating reports,
- Exporting reports,
- A guide to using the tool,
- An open source solution,
- Free tool testing,
- Cloud storage and
- Possibility of integration (Box, Dropbox, Google Drive, Microsoft One Drive).

The more detailed comparison of tools regarding their functionality is presented in Table 1.

**Table 1.** Comparison of tools

Tool / Functionalities	Cascade Strategy	Envisio	On Strategy	Plan view	Bitrix 24	KPI Fire
Idea generator	X	X	✓	X	X	✓
Strategy planning	✓	X	✓	X	X	✓
Vision definition	✓	X	✓	X	X	X
Entering organisational value	✓	X	✓	X	X	X
Entering organisational goals	✓	X	✓	X	X	✓
Entering of new projects	✓	✓	✓	✓	✓	✓
Project charter	X	X	X	X	X	✓
Indicators of success	✓	✓	✓	✓	✓	✓
Dashboard	✓	✓	✓	✓	✓	✓
Creating reports	✓	✓	✓	✓	✓	✓
Exporting reports	✓	✓	✓	✓	✓	✓
A guide to using the tool	✓	X	X	✓	X	✓
An open source solution	X	X	X	X	X	X
Free tool testing	✓	✓	✓	✓	✓	✓
Cloud storage	X	X	X	X	✓	X
Possibility of integration	X	X	X	X	✓	X

The vision, goals and values of the organisations were created in the tools that made it possible. This was followed by the creation of activities, which were carried out after the workflow until their completion. Reports, dashboards and performance indicators were also tested based on these activities. When entering the vision, organisational value and goals, the main difference between the tools were shown. Only KPI Fire, Cascade Strategy and On Strategy tools can enter the mentioned elements.

In the next steps, the activities were entered into the tools, which turned out to be very similar for all tools. All tools enable the entry of these activities, the implementation of certain works on these activities (at what stage the activity is, how much time is provided for completion, who is in charge of the activity, which persons are involved in the activity and how). Based on these settings over the activities, it is possible to create a control panel in the tools that will display important data for the responsible individuals. Based on the reports provided by the tools, the Planview tool stands out, which has a large set of reports.

Of all the tools analysed, the Bitrix24 tool brings the most functionality to organisations. It is clear from the presentation that it is not only a tool that would allow real-time monitoring of the company's path, but also includes a Human Resources module, where they can use the tool to manage employee data, recorded hours and communication between employees. The tools do not allow the definition of a Strategic Plan, as it is a document that records the data planned by those responsible for planning in organisations. The tools presented are intended primarily to follow the Strategic Plan once it has been created, and are not to aid in planning, but to support in the implementation of the Strategic Plan.

Cascade Strategy and On Strategy are the best tools after conducting the experiment. The tools support a lot of functionality, and, at the same time, are easy to work with. Their great advantage is that the tools are very well documented, as they enable users to work easier, simpler and faster.

Second place belongs to the KPI Fire tool. It is a tool that has a lot of functionality. The problem with the tool, however, is the documentation, as the steps for using certain functionalities are not recorded exactly.

Third place is occupied by the Planview tool. A great advantage of the tool are the reports, as they cover a wide range of different views of the data.

The Bitrix24 tool is in fourth place. It is a tool that places more emphasis on running a business and managing Human Resources, less on following a Strategic Plan. It is a great tool for smaller businesses, with which an organisation can engage its employees.

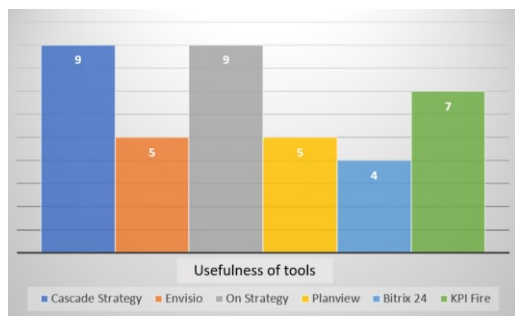
The Envisio tool occupies the last place. According to the obtained data, it is a tool that helps in the implementation of the Strategic Plan. A problem arose during testing because the tool was requested to gain access to the test environment, which was not obtained.

## 6 Conclusion

Strategic Planning and implementation of a Strategic Plan is an important component for organisations, therefore the purpose of the paper was to explore the tools that could provide support while creating a Strategic Plan and monitoring its success.

Based on the literature, information was gathered on the tools that are most common within scientific papers and forums and cover as much functionality as possible. The aim of the task was to obtain information about what functionalities the tools provide. An experiment was performed according to the obtained data. The tools had many elements in common however differed in the number of functionality and therefore provided different support.

A comparison of the tools' functionalities, and their usefulness is presented in Figure 9, revealing that the best tools are Cascade Strategy and On Strategy.



**Figure 9.** Comparison of strategic tools based on the number of functionalities

The future work will include an interview with the individuals in charge of creating and implementing a Strategic Plan in the companies. The aim of the interview will be to gain as much information as possible from these individuals, and their opinions on how this could be improved. According to the data obtained we will evaluate how much of Excel type of management is still present and how many of the listed tools are actually applied in organisations, since the main identified problem is monitoring the implementation of the plan. Future work will also include a survey on a larger set of organisations

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