



The DuPont Experience: Strategic Planning for Information Design and Development Organizations



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In this article I examine the strategic planning experience of the Information Design and Development organization in DuPont's External Affairs division. It describes why we undertook our strategic planning initiative, the process we used, the logistics involved in preparing for and carrying out the process, and the results of our work. Our experience can be applied to other similar organizations.

SOME BACKGROUND

Our strategic planning effort began early in 1995. Our organization was then called Technical Publications, although our work involved designing, developing, and producing a broad portfolio of information products dealing with both technical and nontechnical subject matter and intended for a range of audiences both inside and outside the corporation. We had about 40 people in the organization who performed functions including writing, editing, graphic design, and production, consulting, and project management. The level of professional communication experience of our staff members varied. A handful had extensive experience (more than 15 years) in a variety of communication disciplines, but at least 40% had been professional communicators for only 2–3 years. Then as now, our organization was part of a centralized communication staff function that also included such specialties as public affairs and media relations; federal, state, regional, and investor affairs; market research and development; the corporate telecontact center; visual communications; and meeting design and staging.

WHY WE DID IT

We were responding to two emotional and environmental realities when we decided to pursue strategic planning; the fear of being outsourced, and the feeling that, in the immortal words of comedian Rodney Dangerfield, we didn't "get no respect." DuPont was in the throes of a major cost-cutting campaign, and organizations like

ours that were considered part of corporate overhead faced particular scrutiny. We needed a way to ensure that, as an organization, we were adding and would continue to contribute sufficient value to our DuPont business partners to justify their retaining us within the company. And all of us were discouraged and weary of what we perceived as lack of regard and respect on the part of our business partners for our work and

our contributions to their business success. We thought our status as an organization was low, and with all the changes occurring inside and outside DuPont, we were at least nervous about our prospects.

Although we knew little of strategic planning at the time, it seemed to some of us that going through a rigorous planning process would give us the information we needed to know how we could best add value to our customers. And a carefully constructed plan, created with input from our business partners, seemed like a tool we could use to educate them and change their perception of us as a low-level service organization. Consequently, I proposed undertaking such a process to our group and our management. Management's response was very favorable and supportive, and although the response of our staff members ranged from highly enthusiastic to cynical and apathetic, at least half of our staffers were interested and committed enough that we had sufficient critical mass to move forward.

HOW WE GOT STARTED

We were fortunate to have in DuPont an internal management consulting organization that worked with our businesses to do various forms of strategic planning. We had done some information development work for them and knew that they used a strategic planning process that had worked well for other DuPont businesses. We enlisted our management to obtain the services of a consultant who facilitated the process for us. This objective,

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in which the leader hand picks a few individuals, they go off to some isolated location, and come back a few days or weeks later with a plan that is then imposed on everyone else. We needed as many of our staff members as possible to contribute their knowledge and problem-solving skills to our planning effort, and we believed that our people would be more committed to a

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his or her concerns had not been addressed.

Finally, we agreed that everything was open for discussion and change, and that nothing was sacred. This proved to be the most difficult of our working principles to put into practice. We did not have a sufficient level of trust among our group for people to feel comfortable saying how they really felt about

outside business expert proved to be essential and critical to our success. He questioned our assumptions, made us develop our plan using language a business leader would understand, and generally held our feet to the fire all the way through the process. He was also an expert in using the process itself, a skill that helped when we got stuck.

We made some crucial decisions early on about how we would do our planning. First, we gave everyone in the organization the opportunity to participate, but we made participation voluntary. This is not the traditional approach to strategic planning,

in which the leader hand picks a few individuals, they go off to some isolated location, and come back a few days or weeks later with a plan that is then imposed on everyone else. We needed as many of our staff members as possible to contribute their knowledge and problem-solving skills to our planning effort, and we believed that our people would be more committed to a plan that they had developed themselves. We presented our planning effort as something that was critical to our continued existence as an organization and as a developmental opportunity in which participation would be viewed favorably during performance reviews, but we did not force anyone to participate.

We also agreed that all decisions would be made by consensus; everyone had to agree with—or at least be able to live with—any decisions we made. We held no votes, however. If someone objected to something, we kept talking about it and working on it until the result was acceptable to all. This decision-making process took longer than some of us would have liked, but it ensured that no one felt as if

aspects of our organization or to openly question why we did things the way we did. As manager, it often fell to me to introduce these subjects and make them officially “safe” for discussion.

THE STRATEGIC PLANNING PROCESS

We used an externally focused, market-driven process developed by our internal consulting group for use with DuPont’s strategic business units. Although we were and are a staff function, not a profit center, we used this process because it forced us to think like a business that competes with other businesses to sell and deliver products and services to customers in specific market segments. Given the very real possibility that our function could be outsourced in the future, we needed to think competitively.

Our strategic planning process included the following major steps;

- ◆ Define the current state (that is, understand the marketplace).
- ◆ Identify significant trends.
- ◆ Define what it will take to win.
- ◆ Create a shared vision of the future (five years out).
- ◆ Analyze the gap between the vision and the current state.
- ◆ Develop a plan and schedule (roadmap) to achieve the vision.

Define the current state

The current state analysis included the following components:

- ◆ Industry definition
- ◆ Value-added chain for our industry
- ◆ Business definition
- ◆ Industry structure analysis
- ◆ Customer analysis
- ◆ Competitor analysis

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After much discussion, we concluded that our organization competes in the information industry but sells to the chemical industry. Although this may seem obvious, for many of us, it was a revelation. We then defined a value-added chain (see Figure 1) for the information industry as it exists in relation to DuPont. This chain is a block-and-arrow diagram that depicts all the entities that add value to a product in its journey from raw materials to a finished product delivered to a consumer. Because the value-added chain is a tool originally developed to help manufacturing industries understand industry dynamics and relationships, applying it to an industry where the product

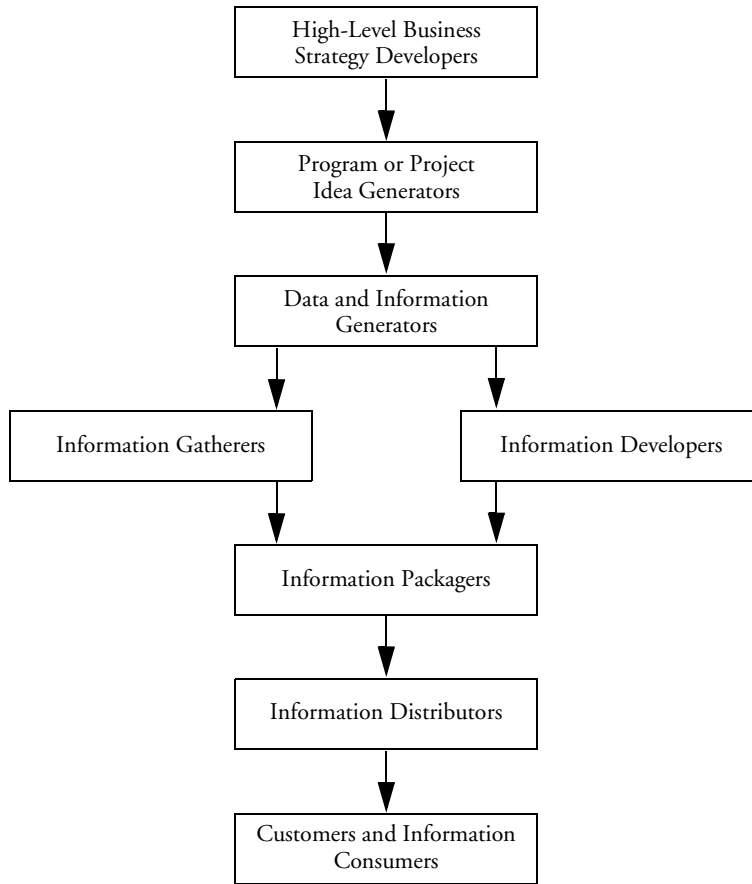


FIGURE 1. VALUE-ADDED CHAIN.

is intangible was an intellectual challenge. But it helped us to understand what happens to information as it is transformed from an idea or set of raw data into a usable, useful product consumed by an information consumer.

We created a business definition that succinctly described what we do (our offering), for whom we do it (our customers), and how they benefit from our offering. We used our business definition to identify where we fit into the value-added chain for our industry. Then we used a set of processes called industry structure analysis first devised by Michael Porter (1980) to understand who the players in our industry are, where they compete in the value-added chain, and most importantly, who has power. Within the context of our strategic planning process, the whole point of the process was to determine how to increase the power we have in the value-added chain.

Next we analyzed our customers—the people who make the decision to buy products and services from us. We identified, surveyed, and interviewed them to determine the critical success

factors for their businesses, their key business values and strategies, the value they place on business and technical information (how it contributes to their business success), and the value

they place on their relationship with us (why they buy from us rather than from someone else). We captured this information in a standardized format for each business within the company, reduced it to a table that listed results from all DuPont businesses, and then drew up the following short list of conclusions about our customers and their relationship with us:

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- ◆ Much of our work was for low-growth businesses.
- ◆ Our working contacts highly valued our work but were not key decision-makers.
- ◆ The real decision-makers were often unaware of us or the value we added to their business.
- ◆ We were viewed as a tactical resource that provided a valuable but ultimately optional service.

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The final step in our current state analysis was a competitor analysis. We identified all of the alternatives available to our business partners in purchasing products and services. We had to think broadly about competitors, because we discovered that our main sources of competition came not from professional information design and development organizations, but from people inside DuPont doing the work themselves. We gathered information about our competitors by interviewing them, talking to our business partners, tapping our network of contacts, and researching publicly available information. We used this information to assess our strengths and weaknesses relative to our competition. From this assessment, we drew the following conclusions about our most significant competitors and our current sources of competitive advantage.

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- ◆ Our main competitors were people in DuPont doing the work themselves
- ◆ Our main sources of competitive advantage were our easy access to DuPont businesses, our relatively high level of quality, our operating and managing processes, and the technical backgrounds of our staff.
- ◆ Our main competitive disadvantages were not having relationships with business decision-makers, lack of strategic thinking and business skills, and a perception that we were expensive and slow.

Identify significant trends

After defining and documenting our current state, we identified and analyzed the external forces we believed would have the greatest impact on our organization’s ability to deliver value to our customers. Such forces included economics, resource and environmental concerns, international factors, technology, and political considerations. We brainstormed a list of every trend we could think of and then used a degree of certainty versus degree of impact matrix to determine which trends we had to plan for (high degree of certainty plus high impact on our organization), which to keep an eye on (low degree of certainty but high impact if they happened), and which to forget about (high degree of certainty but low impact, low degree of certainty and low impact). From this analysis, we created the following short list of the most important trends likely to affect us:

- ◆ Rapidly changing information technology
- ◆ Continued emphasis on cost control in DuPont
- ◆ New focus on business growth in DuPont

Identify what it will take to win

Armed with our current state assessment and agreement on key trends, we identified the things we absolutely had to do to be successful in the future. In this analysis, we answered the following questions:

- ◆ How can we gain power relative to others in the industry?
- ◆ Which customers should we serve?
- ◆ Which competitors should we focus on?

The data we needed to answer these questions came from the various components of our current state assessment. We developed the following list of critical success factors:

- ◆ Lead DuPont in applying information technology to communication needs.
- ◆ Focus our resources on healthy businesses.
- ◆ Develop a set of products and services that businesses must have but can’t provide for themselves.
- ◆ Earn the status of preferred provider.

Create a shared vision of the future

Finally, after 6 months of investigating where we were, we were ready to start thinking about where we intended to be in the future—a shared mental model of what we wanted our organization to be in the year 2000 (Figure 2). Our vision addressed the following considerations:

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- ◆ Who our customers will be and what kind of relationships we will have with them
- ◆ What products and services we will provide
- ◆ How our products and services will benefit our business partners
- ◆ How we will do our work
- ◆ How we will be recognized and rewarded

Figure 2 shows the vision we created.

Who we serve:
 We are involved at a strategic level with each of DuPont's strategic business units.

What we do:
 We design, develop, and manage usable, useful information solutions.
 We identify and promote the appropriate use of leading-edge communication technologies and methodologies to our business partners.

How we benefit our partners:
 Our information solutions provide measurable competitive advantage to our business partners.

How we work:
 We work in flexible, self-managed teams focused on business objectives.
 We are leaders in using communication technologies and methodologies.
 Our internal processes ensure usable, useful information solutions.

How we are recognized:
 We are recognized and supported as an essential part of a global communication core competency within DuPont by senior management, business leaders, competency peers, and information industry leaders.
 Our business partners gladly support us with continued business, recognition, resources, and retention within DuPont.
 We are recognized individually through professional and organizational advancement.

FIGURE 2. SHARED VISION OF THE FUTURE.

Analyze the gap between the vision and the current state

We all were elated when we finished creating and documenting our shared vision. Depression set in when the euphoria wore off, and we started thinking about all the obstacles and barriers to getting there. Fortunately, our strategic planning process anticipated our negative reaction and used it constructively.

We began by encouraging everyone to whine to his or her heart's content about all the reasons we could never achieve our vision. We individually wrote our obstacles and barriers on sticky notes, one obstacle per note. Then we plastered the notes all over the walls of our meeting room. We all wandered around reading all the notes, and then we rearranged and grouped the notes into labeled categories based on themes that emerged. For example, one theme was that our current organizational structure was more of a hindrance than a help. Another was our lack of contact with key decision-makers in the businesses. When we finished, we had identified five or six major themes, with a number of specific problems related to each of them,

and a very good idea of the challenge with which we were faced.

In addition, most of us felt better for having the opportunity to vent our frustrations. Now we were ready to get on with the last step in our planning process.

Develop a plan and schedule to achieve the vision

Using our extensive list of perceived obstacles and barriers as a starting point, we asked team members to write on a sticky note a possible solution for each obstacle or barrier they had raised earlier and for any other obstacles or barriers they felt like tackling. Then we posted the proposed solutions on the wall next to the previously identified obstacles and barriers. We reviewed the proposed solutions as a group, not to judge them on their merits, but to make sure we had them in the right places and to consolidate similar solutions.

Then we unfurled a large roll of paper and fastened it to the wall. On this roll of paper was printed a matrix of ten columns and three rows. The columns represented six-month time intervals, beginning with the first half of 1996 and continuing through the second half of 2000. The rows were labeled from top to bottom: Events, Activities, and Metrics.

We asked everyone to place the solution stickies on the matrix in the columns representing the time intervals in which we thought the solutions needed to be complete if we were to achieve our vision by 2000. We were free to move solutions from one time slot to another if we thought it appropriate. Then, as a group, we assessed each solution in terms of whether it was an event, an activity necessary to make an event happen, or a metric that measured an event or activity. We posted each solution in the appropriate row, and in some cases, moved solutions from one time slot to another. The rule was that activities precede events.

When we finished, we had a roadmap to our vision. This map had some holes in it, particularly toward the end of the timeline. It also contained some contradictions that needed to be resolved, but it addressed 80% of our concerns about how we would get where we wanted to be, and it provided a solid basis for us to begin to implement our plan.

IMPLEMENTING AND COMMUNICATING OUR PLAN

The events, activities, and metrics on our roadmap fell into the major categories of work that we identified when we performed our gap analysis. We formed teams to address each major category of work. The teams were charged with filling in the holes and resolving contradictions in their work categories and with planning and performing the activities called for in the various time segment of the roadmap. Each team designated a leader who participates on a steering team to ensure that the efforts of the various teams are coordinated and to facilitate communication among the teams.

We also formed a small team to develop a communication plan to promote our vision and strategic plan to our key stakeholders: our own organization, our customers, our manage-

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the current state analysis, consisted of data gathering by small teams. This work took place in the time between the large group meetings. Obviously, this work required a significant time commitment from the participants, but they felt sufficiently invested in the process and its outcome to make the time available.

Our work teams accomplished virtually all of the activities planned for 1996. At the end of 1996, we reviewed our progress and re-evaluated our vision and the plan for 1997. We made some changes based on new information and our experience in 1996, and we are now implementing the plan for 1997.

While we have a good level of commitment to and understanding of our vision and strategic plan on the part of most of our staff, some of us still have difficulty envisioning ourselves in our future state and are afraid of the future. This is partly due to human nature and partly to a perceived lack of the skills that will be required to function effectively in the future. We are

ment, our competency peers within DuPont, and the vendors from whom we purchase information products and services. We rolled out the vision and strategic plan to these constituents in early 1996.

RESULTS TO DATE

We spent virtually all of 1995 developing our strategic plan. Over 50% of our organization participated in the strategic planning process to some extent, and 13 of our people were involved all the way through. We held a series of two-day meetings spaced six to eight weeks apart to do the reviews and consensus-building necessary to the process, but much of the work, especially in

attempting to address these concerns through targeted development plans for each staff member, individual and group training when necessary, and adjustments to job assignments so people can gradually and more or less safely get experience doing the things we need to do more of in the future.

Our planning activities have already resulted in some work that is new and more strategic than we have traditionally done, particularly in the area of marketing and business planning, and we have expanded our network of contacts in the business units. We're beginning to establish relationships with some of those decision-makers in the businesses, and we have been recognized by the leadership of our own function as critical to DuPont External Affairs' ability to lead the company in applying information technology to solving business communication problems. We've also added another service to our portfolio—consulting with other groups on how to do strategic planning.

In conclusion, we've recognized that strategic planning is an iterative, core business process, not an event. We've integrated it into the way we do our work, and it's become a part of our everyday work lives. It allows us to control the things we can control and to manage the things we can't. It gives us a target to march toward and a set of shared beliefs that inform the decisions we make daily. We think that's about as good as it gets. □

REFERENCE

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