

# IEEE Technology Management Council Spain Workshop

## The Strategic Planning Documented

### Part II: Strategy Markup Language (StratML)

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# Part II: StratML

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# Good “tools” for Strategic Plans



A video player interface showing a man in a suit and glasses speaking. The video is titled "OWEN AMBUR" and "Co Chair, Start ML Committee". The player includes a play button, a progress bar, a timestamp of 02:53, and a full screen button. On the right side of the video frame, there are three social media interaction buttons: LIKE, LATER, and SHARE.

OWEN AMBUR  
Co Chair, Start ML Committee

02:53

HD

## Good “tools” for Strategic Plans

Elements of strategic plans should be easily

**Shared**  
**Referenced**  
**Indexed**  
**Discovered**  
**Linked**  
**Reused**  
**Analyzed**

## Why a machine-readable language here?

Enabling the concept of "**strategic alignment**" and linking:

- goal
- objective statements
- and all other records created by organizations in their business processes.

## Why a machine-readable language here?

Discovery of **potential performance partners** who share common goals and objectives

Produce **inputs needed** or require outputs produced by the organization compiling the strategic plan

Facilitate **stakeholder feedback** on strategic goals and objectives

# Why a machine-readable language here?

## Updating and maintenance of discrete elements of strategic plans

- Without requiring review and approval of the entire plan through bureaucratic channels,
- Helping to make the strategic planning process more agile and
- Responsive to stakeholder feedback and changing circumstances,
- Thus helping to overcome the tendency of strategic plans to become outdated "shelfware".

Avoid associated elements related with maintaining data redundantly in myriad "**stovepipe**" **systems** rather than referencing the **authoritative sources**, reducing:

- Time,
- Effort,
- Inconsistencies,
- Delays

## Why a machine-readable language here?

Work together to :

- **Link performance goals to key groups (stakeholders),**
- **Adopt open standards (e.g., StratML)**
- **Enabling the organization and categorization of information**
- **Searchable electronically and interoperable**

Track and *monitor* the *performance* of organizations about whose goals you care

# Why a machine-readable language here?

In addition... more benefits

Engage employees, partners, and other stakeholders not only in crafting but also carrying out strategic goals and objectives, more efficiently and effectively.

More easily discover and participate in the establishment of goals and objectives of our company/public agencies whose missions are of particular interest to you.

Standard vocabulary and schema for strategic plans will make it easier to develop applications and services.

More easily discover those who share your values and are pursuing objectives you consider to be worthy of priority for your support/collaboration/"coopetition".

Review and provide feedback far more efficiently and effectively on the goals and objectives of companies that are truly customer focused and share their strategic plans openly.

# Strategic Semantic Business Web

- Semantic Web (of Meaning)
  - Linked Open Data
  - Tim Berners-Lee [5-Star Data](#)
- StratML: XML vocabulary and schema for strategic plans
  - Linkage of Missions, Visions, Values, Goals, Objectives, Stakeholders, Inputs, Processes, Outputs & Outcomes
    - Interoperability & Strategic Alignment
  - Worldwide Network (Web) of ***Intentions & Results!***
  - Maturation of “Social” Media/Networking Services
    - For Business-Quality Purposes

## Definition

- Strategy Markup Language (StratML) Part 1 is an XML vocabulary and schema for the elements commonly contained in strategic plans.
- StratML Part 2 extends Part 1 to include the additional elements required for performance plans and reports.
- StratML Part 3 and perhaps additional parts will incorporate additional elements that, while not deemed essential, may add value to the core elements of strategic and performance plans.

## Focus & Intent

Started in the USA but intent to be adopted as an **international voluntary consensus standard**

Searching for accountability and optimal performance and efficiency in government, but potential use by all organizations worldwide too.

# StratML Part 1 & 2

## Part 1

ANSI/AIIM 21:2009

International Standardization

- ISO/TC 171/SC 2 in progress

Core Elements

1. Organization
2. Mission
3. Vision
4. Value
5. Goal
6. Objective
7. Stakeholder

## Part 2

Part 1 + ANSI/AIIM 22:2011:

**Additional Elements:**

8. Stakeholder Roles.
9. Performance Indicators

## StratML Part 2: additional elements

- Metric - At least one Objective **should** be included and a Metric **should** be associated with it.
- Outcome - At least one desired Outcome **should** be specified, because no organization should exist solely for self-serving purposes.
- Output - The Outputs required to achieve the desired Outcome(s) **should** be specified.
- Input - The Inputs required to produce Outputs **should** be specified.
- Process - The Processes required to produce Outputs and Outcomes **should** be specified.
- Stakeholder - At least one Stakeholder of the performer type should be identified, although the named performer may be an organizational role rather than a particular individual.

# StratML Part 3: Candidate Elements

Part 3 is Under Development (Participation is Open & Welcome)

- Geospatial Referencing
  - Organizations, Goals, Objectives & Stakeholders
- Citation of Legal or Other Authorities
  - Laws, Regulations & Policies
- Categorization of Goals, Objectives & Performance Indicators
  - Under Various , User-Determined Taxonomies
- Documentation of Relationships
  - Among Goals, Objectives & Performance Indicators
- Strategy Formulation Frameworks & Methods
  - SWOT &/or PEST
- Documentation of Organizational Core Competencies & Value Propositions
- Etc.

## First context: StratML for Governments

- ***Cooperation***  
between government agencies and others stakeholders (public-private partnership & citizen, etc.) to link their performance goals.
  
- Adopt ***open*** standards  
enabling the organization and categorization of Government information in a way that is searchable electronically and interoperable across agencies and organizations.

# StratML Forms, Tools & Service Prototypes

- Documentation & Transformation Services
- CAM Interactive Documentation
- Authoring/Editing Tools
  - Adobe, Xopus, Business Web Software, XForms....
- Tag Cloud
- Atom Demonstration
- Basic Stylesheet
- Farsi Translations & StratML Transformation Portal
- Search Service
- Schema Design

# StratML Forms, Tools & Service Prototypes

- During the development, piloting, proof-of-concept phase, more than 900 strategic plans have been rendered in StratML format, using seven different authoring/conversion tools, including:
  - Microsoft [InfoPath](#) using this [form](#)
  - Adobe PDF Fillable [Form](#)
  - [Xopus Form](#) (Available in Spanish as well as English)
  - [XForms Form](#) for StratML Part 1
  - [XForms Form](#) for Part 2
  - Microsoft Word, with assistance

# StratML Forms, Tools & Service Prototypes



### Advanced Search

Full Text:

Vision:

Mission:

Organization Name:

## StrategicPlan.xsd - Version 1.0

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### Data Dictionary

**Acronym**

An abbreviation of a proper name, usually composed of the first letters of the first letters in the name.

**Acronym**  
 type string



**StratML**  
This DNAOS-powered StratML portal, documents, as confirmed by the portal's...

**Resources**  
The portal also provides a wide range of tools and resources, including some from documents.

**Strategy Plan & Performance Report**  
Every project and organization requires plans.

**AIM/ANSI Standards**  
AIM and ANSI have been working very...

**More on StratML Standards**  
The StratML References section also has and versions.

**StratML Documents**  
The StratML portal provides complete rendered to navigable Web sites access, create, edit, and view StratML documents and resources are also available...

**Current Content**  
The section menu below provides all StratML are added regularly. See also...

## StratML Parsing Demo

This page demonstrates some of the ways information from Strategic Plans documented in the...

### Strategic Plan Goal "Tag Cloud"

**Education Advocacy Leadership Mentorship**

Collaboration Partnerships Representation Community Outreach  
 Human Capital Promotion Education and Training Learning  
 Excellence Policy Recommendations Participation Information  
 Financial Performance Technology Accountability Operational  
 Competitive Sourcing Efficiency and Effectiveness Diversity  
 Fraud and Errors (ED) Customer Satisfaction Data and Information  
 CERTIFICATION Budget and Performance Integration Supply Chain  
 Research and Scholarship Customer Service Management Sustainable  
 Management Excellence Capacity Building Platform Dependent Standards Data and Function Sharing  
 Platform Independent Military Housing Conformity Assessment Foundational Systems Networking  
 Service Conferences Funding Future Environment Organizational Management Standardization Cost  
 Savings Scholarship Strategic Goal 6 Safety Health Faith and Community Overseas Presence Round-the-  
 Clock Service Critical Needs Strategic Goal 1 Strategic Goal 2 Strategic Goal 3 Data and Information  
 Sharing Strategic Goal 5 Strategic Map Member Services Results State Health Insurance (HHS) R&D  
 Investment Criteria Knowledge Dissemination Recognition Dispute Resolution Information and

**Information**

**StratML for U.S. Federal Agencies**

You are viewing a feed that contains frequently updated information from the Common Feed List. Updated information from the feed is viewed in Internet Explorer and other programs. Use the feed icon to subscribe to this feed.

**Department of Transportation**  
 Tuesday, August 26, 2008, 1:00:00 PM

Department of Transportation (DOT)  
**Vision:** Safe, efficient transportation systems  
**Mission:** The national objectives of general welfare, economic growth, and national security require the development of transportation policies and programs that provide for convenient transportation at the lowest cost consistent with the national interest and conservation of the resources of the United States.

**Department of Veterans Affairs**  
 Tuesday, August 26, 2008, 1:00:00 PM

Department of Veterans Affairs (VA)  
**Vision:** We will strive to meet the needs of the Nation's veterans and their families, even more veteran-focused organization, functioning as a premier organization for women who have served our Nation; (2) cultivating a dedicated workforce that believes in, and takes pride in our vitally important mission; (3) service with the best in business and use innovative means to improve the quality of our service.

StratML element in English	Translated Term in Farsi
StrategicPlan	برنامه راهبردی
PerformancePlan	برنامه فعالیت
StrategicPlanCore	هسته برنامه راهبردی
AdministrativeInformation	اطلاعات مدیریتی

**Strategic Plan Form**

Source:  
<https://www.whitehouse.gov/omb/budget/fy2009/mgmt.pdf>  
 Start: 2001-10-01 End: 2008-12-31 Date: 2007-05-24

Submitter: \_\_\_\_\_ Organization: \_\_\_\_\_  
 First name: Owen Name: President of the United States  
 Last name: Ambur Acronym: POTUS  
 Email Address: Owen.Ambur@verizon.net

[Table of contents](#)

[Vision](#)  
[Mission](#)  
[Values](#)  
     [Citizen Centricity](#)  
     [Results Focus](#)  
     [Market Based](#)  
     [Human Capital](#)  
     1.1 [Citizen Centricity](#)  
     1.2 [Service-Delivery Staffing](#)  
     1.3 [Organizational Realignment](#)

# StratML Forms, Tools & Service Prototypes

## Strategic Plan

Name of Plan:

Description of Plan:

Other Information:

Organization:

Acronym:

Identifier:

Description of:

Stakeholder:

**Name**

Insert item

Insert item

Vision:

Identifier:

Mission:

Identifier:

Values:

**Name**

Insert item

### StratML Sample Form

**Submitter Information**

First Name:

Telephone Number:

Start Date:

**Source Information**

Source:

Name:

**Strategic Plan**

Vision (+):

Mission (+):

Value:

Name:

Description (+):

Goals:

Goal Name:

Description (+):

**Stakeholders**

Stakeholder Name:

Strategic Plan Form

Table of Contents

President-Elect Obama's Change Agenda

Strategic Plan

President-Elect Obama's Change Agenda

Strategic Plan Form

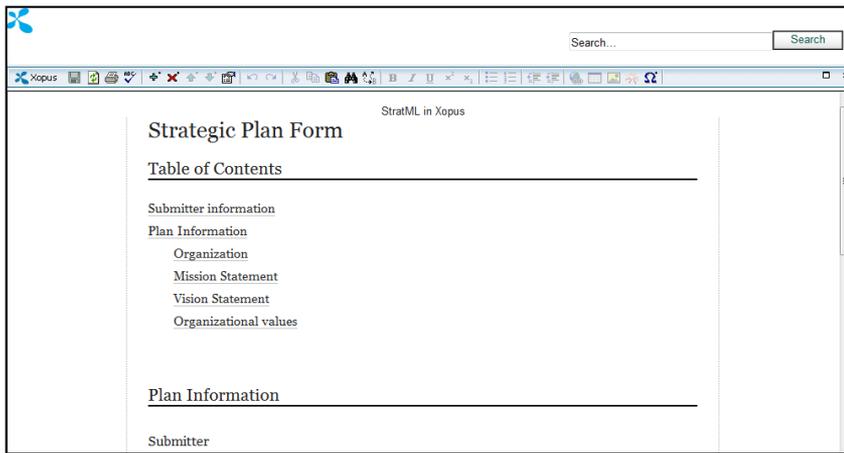
Strategic Markup Language (StratML) Documents

Doc Name	Org. Acronym	Org. Name	StratML	Mission Description
A Practical Guide to Federal Enterprise Architecture	FEAPG	A Practical Guide to Federal Enterprise Architecture		To provide guidance to Federal Agencies in initiating, developing, using, and maintaining an enterprise architecture (EA).
A Practical Guide to Federal Service Oriented Architecture	POPSOA	A Practical Guide to Federal Service Oriented Architecture		To describe a target federal service oriented architecture vision and to provide guidance in the management and governance of enterprise-wide services. To help federal chief architects and chief information officers in their efforts to adopt SOA best practices to further their organizations' mission outcomes, meet increasingly demanding compliance requirements, and optimize their IT architectures.
ARMA International	ARMA	ARMA International		The mission of ARMA International is to provide education, research, and networking opportunities to information professionals to enable them to use their skills and experience to leverage the value of records, information, and knowledge as corporate assets and as contributors to organizational success.
ASTM International	ASTM	ASTM International		To be the foremost developer and provider of voluntary consensus standards, related technical information, and services having globally recognized quality and applicability that promote public health and safety, the environment, and the overall quality of life; contribute to the reliability of materials, products, systems and services; and facilitate international, regional, and national commerce.
Academic Pediatric Association	APA	Academic Pediatric Association		The APA is dedicated to improving the health of all children and adolescents through leadership in education of child health professionals, research and dissemination of knowledge, patient care, and advocacy, in partnership with children, families and communities.
Academy of Management	Aom	Academy of Management		To enhance the profession of management by advancing the scholarship of management and enriching the professional development of its members.
Accredited Standards Consortium X12	ASC X12	Accredited Standards Consortium X12		ASC X12 brings together business and industry professionals in a cross-industry forum to develop and support electronic data exchange standards and related documents for the national and international marketplace to enhance business processes, reduce costs and expand organizational reach.
Action Without Borders	AWB	Action Without Borders		Action Without Borders connects people, organizations, and resources to help build a world where all people can live free and dignified lives.
Advisory Commission		The mission of the Advisory Council on Historic Preservation is to promote the preservation, enhancement		

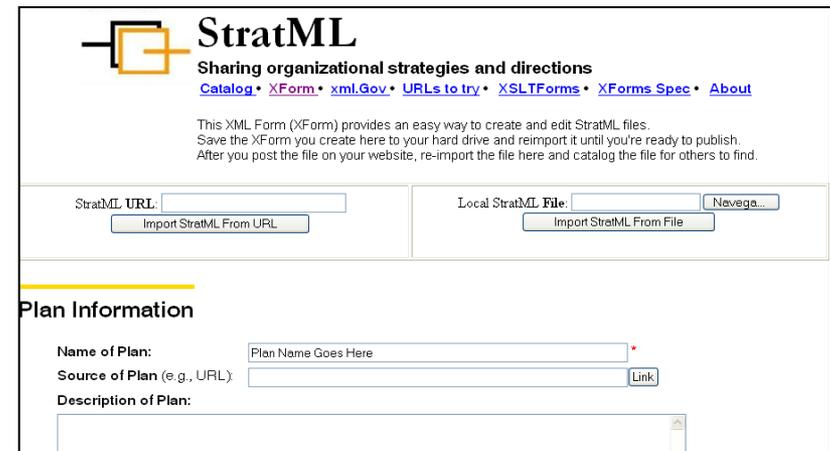


# Group Activity: XForm

1. Creating the plan.
2. Publishing the Plan using Xform to create a StratML Part 1 document.
3. Updating a Plan using Xform in a StratML Part 1 document.



The screenshot shows a web browser window with the title "StratML in Xopus". The main content area is titled "Strategic Plan Form" and contains a "Table of Contents" section. The table of contents lists the following sections: "Submitter information", "Plan Information", "Organization", "Mission Statement", "Vision Statement", and "Organizational values". Below the table of contents, there is a "Plan Information" section and a "Submitter" section. The browser's address bar shows "Xopus" and the search bar is empty.



The screenshot shows the StratML web application interface. The title is "StratML" with the tagline "Sharing organizational strategies and directions". Below the title, there are links for "Catalog", "XForm", "xml.Gov", "URLs to try", "XSLTForms", "XForms Spec", and "About". A paragraph of text explains that the XML Form (XForm) provides an easy way to create and edit StratML files, and that users should save the XForm to their hard drive and reimport it until they are ready to publish. After posting the file on their website, they should re-import the file here and catalog it for others to find.

The form includes two input fields for "StratML URL" and "Local StratML File", each with an "Import StratML From" button. Below this, there is a "Plan Information" section with a "Name of Plan:" field (containing "Plan Name Goes Here"), a "Source of Plan (e.g., URL):" field (containing a "Link" button), and a "Description of Plan:" field.

## Links, documents & references used

- Excellence in financial Management: <http://www.exinfm.com>
- IEEE Strategic Plan: <http://ewh.ieee.org/tab/strategy/index.php?context=IEEE>
- Strategy Markup Language: Maturing Social Networking Services for Machine Readable Government and the Strategic Semantic Business Web: <http://www.xml.gov/stratml/references/SPIConference20111209.pdf>
- StratML:
  - Joinup (European Commission): <http://joinup.ec.europa.eu/asset/stratml/description>
  - AIIM: <http://www.aiim.org/Research-and-Publications/Standards/Committees/StratML>
  - Official site: <http://xml.gov/stratml>
  - Quick start guide: [http://xml.gov/stratml/references/StratML\\_QuickStart\\_Guide.pdf](http://xml.gov/stratml/references/StratML_QuickStart_Guide.pdf)
  - Definition & purposes: <http://xml.gov/stratml/#DefinitionPurposes>
  - Current work & results: <http://xml.gov/stratml/#WorkResults>
  - Schema: <http://xml.gov/stratml/#xsd>
  - Forms: <http://xml.gov/stratml/#Forms>
  - Search and prototypical services: <http://xml.gov/stratml/#Services>
- US HUD Strategic Planning Resources: <http://portal.hud.gov/hudportal/HUD>

**Thank you very much!!**

<http://sites.ieee.org/spain-tmc/>



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