



# Integrated Planning linked to Requirements

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 requirements related to Integrated Planning, the Integrated Planning linked to Requirements is built as a matrix. The matrix is a representation that shows the relationship of captured information between specific decomposed and/or composed requirements (high level and/or detailed) and planning objects. The core idea of an Integrated Planning linked to Requirements Matrix is that it typically consists of requirement 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 Requirements 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 Requirements

The Integrated Planning linked to Requirements Matrix provides you with a detailed overview of the cross relationships between requirements (high level and/or detailed) of 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 Requirements

Identify, document and relate requirements (high level and/or detailed) 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 requirement may set a specific requirement for different plans, external and/or internal forces and drivers, strategies, objectives, risks and organizations.
2. Multiple requirements may set specific requirements for any single specific plan, external and/or internal force or driver, strategy, objective, risk and organization.

| What<br>(What are the requirements around planning) | What   |                                    | Why               |          | Which     | Where |              |
|---|--------|------------------------------------|-------------------|----------|-----------|-------|--------------|
|   | Plan # | Force<br>(competitive positioning) | Driver<br>(focus) | Strategy | Objective | Risk  | Organization |
| Requirement 1                                       | #      |                                    |                   |          |           |       |              |
| Requirement 2                                       | #      |                                    |                   |          |           |       |              |
| Requirement N                                       | #      |                                    |                   |          |           |       |              |

Table 1: Integrated Planning linked to Requirements.

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








| Objects used within Integrated Planning linked to Requirements                      |  |  |
|---|--|--|
| 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.   |

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

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