



The Napkin Guys: How Organizations Should Approach Strategic IT Planning

Bryan Bechtoldt: So, Tim, at Red Crown.

Tim Hanson: Another year.

Bryan: I know. What a fantastic place this is.

Tim: Isn't this wonderful? You know, Bryan, I was thinking kind of retrospectively as we think about this, each year we come up for our partner retreat and it's just such a great experience for us and I thought how well it parallels with how maybe organizations should think about strategic IT planning.

Bryan: Yeah, probably specifically about how they have to get away from the chaos to really consider what they should do and think through as deeply as they can. What the impact on their business is.

Tim: First fundamental element of planning, right? Step away from the business. Take time to think about it.

Bryan: Yeah.

Tim: Innovate. Second, what better experience at Red Crown than our opportunity to network. I mean many people don't know this type of environment, but we get a chance to be away from it all. Up here in the north woods of Wisconsin, all of our partners together allows us to just step back and solicit feedback from all of the different voices, all the different opinions, and then take time to assemble that into a good strategic plan.

Bryan: Right.

Tim: It's really useful.

Bryan: Yeah, everybody kind of gets an opportunity to kick the can and contribute to the ideas that are gonna take us forward, and I think that makes us stronger. It's a culture that's inclusive. Everybody gets a chance to contribute, and I think that's how you build a really good culture.

Tim: Yeah, I agree. Last, but not least, what do we do when we're up here?

Bryan: We have a hell of a lot of fun!

Tim: We have fun. And I think a lot of people in their planning process kind of forget that. Everybody goes into business with, usually they have fun doing it, they like what



they're doing, they enjoy it. As we get into our day-to-day activities, we sometimes forget why we're in business. When we're at Red Crown we step away from our business but we have some fun and we remember why we do what we do. I think it's just a great parallel for how we think about strategic planning. And it gives us a chance to be reflective and remember that.

Bryan: We all love to build, that's why we do this.

Tim: Yeah.

Bryan: So great points, Tim. I want to make sure I get them captured. So, what we really want to do is, we want to go back through and we want to understand that you got to have fun in the business and it's got to be the thing that's positive and drives you with it. So, have fun.

Tim: You always have to have fun.

Bryan: Enjoy the journey.

Tim: I would say number two is we solicit feedback from the ecosystem and then assemble that feedback and make direction from it.

Bryan: Yeah, exactly. It gives us the idea to make sure we've pressure tested what we want to do, everybody's got an opportunity to contribute. Hugely important. And third, Tim?

Tim: Purposefully take time to do it right. Step away from the business, move into an environment where you can be thoughtful, purposeful.

Bryan: Yeah, take the time.

Tim: Take the time to think about it.

Bryan: Awesome. Well, we got two days of this together. I can't wait to see what happens tonight, tomorrow morning, and tomorrow night. And all the great ideas that are gonna come from all of our fantastic partners.

Tim: Looking forward to it. Thanks, buddy.