Strategy Markup Language: An AIIM Best Practice for Strategically Managing Information and Engaging Performance Partners to Accomplish Shared Objectives

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The second of Stephen Covey's famous *Seven Habits of Highly Successful People* is: "Begin with the end in mind." He said, "Your mission statement makes you the leader of your own life. You create your own destiny and secure the future you envision."[1] However, reality is a bit more complicated than that. Covey himself initially set forth six other habits and subsequently added another, for a total of eight.[2]

The vision of the StratML standard (ANSI/AIIM 21:2009 & 22:2011 & ISO 17469-1) is: ***A worldwide web of intentions, stakeholders, and results.***

Intentions ~ What do we want to accomplish? What are our longer-term goals and near-term objectives?

Stakeholders ~ Who is trying to do it and for the benefit of whom?

Results ~ How do we know if progress is being made and when success has been achieved?

Based upon Hypertext Markup Language (.html), the WorldWide Web (.www) is currently more about how information is presented than what it means. Tim Berners-Lee has proposed development of the Semantic Web, comprised of linked, open data (LOD),[3] but relatively few people understand why they should care to have more links than the Web already provides. They don't know how it will help them accomplish ***their*** objectives, much less what they might ***do*** to contribute or to take advantage of LOD.

In the 1950s Peter Drucker popularized the concept of Management by Objectives (MBO).[4] However, it fell into disfavor for a number of reasons.[5] Some detractors even suggest that setting goals may be counterproductive because change is now occurring too rapidly and people may engage in bad behavior simply to meet artificially specified objectives. So if you are among those who enjoy in flying by the seat of your pants and being surprised by where you end up, you may wish to stop reading now.

On the other hand, if you are among those who are inspired by the thought of taking charge of our own destiny, we invite you to join us in turbocharging MBO on a worldwide scale to form peer-based partnerships to achieve objectives we share with others – via the **Strategic** Semantic Web. Toward that end, here are some of the best practices enabled by the StratML standard:

- Machine-readability[6]

The GPRA Modernization Act (GPRAMA) requires U.S. federal agencies to publish their strategic and performance plans and reports in machine-readable format, like StratML.[7] That is good practice not only for agencies at all levels of government, worldwide, but also for all organizations whose plans and reports should be matters of public record, including, for example, corporate social responsibility (CSR) plans and reports.[8] Indeed, individuals who choose to lead mission/goal-directed lives and need to engage others to achieve their personal objectives can also benefit from publishing their performance plans and reports on the Web in StratML format.

- Stakeholder Consultation & Linkages

One of the problems with strategic planning as it is commonly conducted is that stakeholders are not actively engaged. An even more basic problem is that many organizations have not even explicitly identified their stakeholders, much less linked their goals to them. Again, Congress has recognized that

problem and established a good practice. The eGov Act requires agencies to work together to link their performance goals to key stakeholder groups.[9] The Government Performance and Results Act (GPRA) requires that stakeholders be consulted.[10] However, as currently practiced, such consultation leaves much to be desired.

· Capability/Process Maturity

All of the existing "social" networking services are immature for business-quality usage. However, combined with an open standard like StratML, ***business*** networking services can help organizations engage their stakeholders far more efficiently and effectively (maturely) than ever before possible.[11]

· Agility

Another problem is that strategic plans are typically updated every three to five years, with considerable time, effort, money, and fanfare invested in publishing them in lovely glossy format … at which point they become "shelfware," outdated before the ink is dry. Maintaining plans in machine-readable StratML format on the Web facilitates updating to accommodate the increasing pace of change.

· Data Centricity (Rather than Software Centricity)

Naturally, as long as their customers let them get away with it, software and service providers want to build into their offerings means of locking users into doing business with them on a long-term basis – particularly by using proprietary data formats, "owning" and controlling their users' data, and making it difficult and costly for them to switch to other products and services. Customer loyalty should be based upon superior service, not proprietary data-based vendor lock-in.

· Data Standards (Semantics & Structure)

Business data and documents should be relatively persistent and maintained in open, standard formats – like StratML – throughout their full life cycles. By contrast, software and services should be fungible, based upon quality and value, which may change as rapidly as the technology supporting it. Switching costs should be low. Software and service providers should compete on the basis of real value-add and superior service, rather than artificially imposed proprietary exploitation of users' data.

· Interoperability

By virtue of compliance with open data standards, information should flow seamlessly across organizational and system boundaries, free of software dependencies.

· Strategic Alignment

Strategic alignment is about marshalling all of the organization's resources to achieve its goals and objectives. Practically speaking – beyond establishing a clear, concise, and inspirational vision statement – that means organizational leaders should:

1) Render the organization's strategic plan in open, standard, machine-readable StratML format;

2) Populate the goal and objective identifier elements with globally unique identifiers (GUIDs) or other identifiers that are standardized, unique, and well-known within the organization;

3) Enable referencing of those identifiers in metadata associated with each record/document/piece of content, thereby creating linkages to the goal(s) and objective(s) it supports and thus strategic alignment, literally speaking; and

4) Make available to the organization's stakeholders a content/document/records management application/service that supports the StratML standard and makes it easy (semi-automatic) for users to provide the necessary metadata.

· Discoverability

It should be quick and easy for users to query and discover content/documents/records based upon the goals/objectives with which they are aligned as well as stakeholder groups they support, and vice versa (top-down & bottom-up).

· Metrics

Performance indicators should automatically be gleaned, aggregated, and reported from records created in the routine course of the business process (rather than as a separate after-the-fact, made-up/make-work reporting process). To accommodate that requirement, the original, authoritative records themselves should be created and maintained in open, standard, machine-readable format so that the process of auditing data maintained in databases can be automatically conducted at any time.

· Partnership

Performance partnerships should be formed around *common values and shared objectives*, which should be cross-referenced in each organization's performance plan. The stratml:Reference elements can be used to do so, by citing the identifiers of the shared objectives. Value-added service providers can reference that data to support each of the performance partners by helping them manage their own outputs while monitoring those of their partner(s).

However, in and of itself, StratML is merely an open, machine-readable data standard for the information commonly contained in strategic and performance plans and reports. It has not yet crossed the chasm from being a duly adopted *de jure* international voluntary consensus standard to becoming a widely used *de facto* standard. For that to happen, good, highly usable tools, applications, and services will be required.[12]

It will be up to enlightened entrepreneurs and software developers to grasp the vision, pursue Blue Ocean strategies,[13] and provide the tools required for millions of organizations and hundreds of millions of individuals to begin to realize the vision of the StratML standard on a worldwide scale.[14]

1 https://www.stephencovey.com/7habits/7habits-habit2.php
2 https://www.stephencovey.com/8thHabit/8thhabit.php
3 http://en.wikipedia.org/wiki/Semantic_Web & http://en.wikipedia.org/wiki/Linked_Open_Data
4 http://en.wikipedia.org/wiki/Management_by_objectives
5 http://en.wikipedia.org/wiki/Management_by_objectives#Limitations
6 Executive Order 13642 establishes machine-readability more broadly as the default for all information of the U.S. federal government. http://xml.fido.gov/stratml/carmel/EOOMRDwStyle.xml An unrecognized implication of the President's directive is that XML schemas (XSDs) should be specified for all Federal records series.
7 http://xml.fido.gov/stratml/references/PL111-532StratML.htm#SEC10
8 https://en.wikipedia.org/wiki/Corporate_social_responsibility
9 http://xml.fido.gov/stratml/references/eGovXML.htm#202b
10 http://www.whitehouse.gov/omb/mgmt-gpra/gplaw2m#h3
11 http://en.wikipedia.org/wiki/Capability_Maturity_Model
12 http://en.wikipedia.org/wiki/Crossing_the_Chasm
13 https://en.wikipedia.org/wiki/Blue_Ocean_Strategy

[14] http://xml.fido.gov/stratml/draft/StratMLToolList.htm