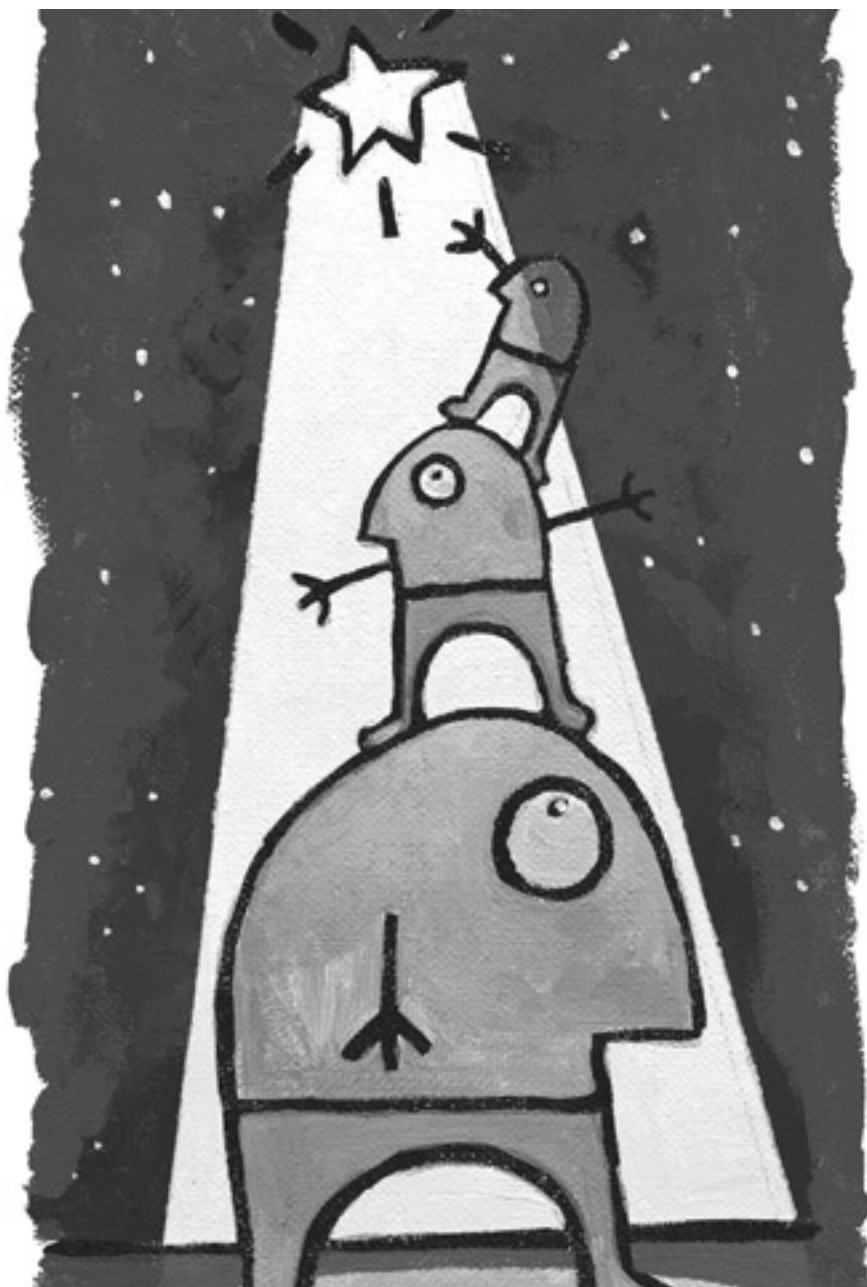


Strategic Planning: What's So Strategic About It?

The strategic aspect of planning implies a structured process, creative thinking, teamwork, and flexibility—plus one very important catalyst

By **Bart Strong**



The words “strategic” and “planning” used together can lead to confusion unless you spent the early years of your career in never-ending, team-oriented, corporate training sessions. Doesn’t *strategic* have something to do with extremely accurate bombing or a defensive missile system or Star Wars or something? Wait a minute, don’t *strategic* and *planning* both mean the same thing? Isn’t it like saying you need to have a plan in your plan or a strategy in your strategy? What exactly am I talking about here? What’s so strategic about planning?

Well, here’s the scoop: “Strategic” implies

- process,
- creative thinking,
- teamwork, and
- flexibility.

“Planning” is just, well, planning. Anybody can plan. Not everybody can be strategic about it.

The Value of Process

Strategic planning uses a methodical, step by gradual step approach to determine who you are (mission), what you are not willing to compromise (values), where you are going (vision), and how you are going to get there (planning). Each careful step is based on the previous step and builds toward a thorough understanding of your institution’s or unit’s business, its viability, and its future. Goals, measurable objectives, and assigned action steps help ensure that your strategic plan has a beginning and an end.

I've been teaching, consulting on, and facilitating strategic planning sessions for public-sector organizations for many years. It never ceases to amaze me how many people are absolutely sure they know what needs to be done right at the beginning of the planning process and don't understand why we waste so much time going over things that they already know to be true. Let's just get it done! At the beginning of my sessions I always need to describe the value of the process and explain why we are going to spend two full days getting from mission to vision instead of two hours. The objective is to get everyone to the same place at the same time with the same information so that group decisions are based on what we all know and all understand. No shortcuts allowed!

There are many different strategic planning models already tested. Each model places varying degrees of emphasis on purpose, mission, vision, values, goals, measurement, achievement, change, tradition, inclusiveness, and profitability. In order to be strategic, a model must fit well with your institutional culture, work environment, and participant mix.

Early consideration must also be given to the question, "Who really determines what our mission should be or how it should change?" Dale D. McConkey said that the client makes that determination based on needs and wants.¹ Is that true in your case? This question certainly deserves some consideration before you get too far into the process and realize that your strategic plan is less strategic than you thought.

The Value of Creative Thinking

In his book, *Selling the Invisible—A Field Guide to Modern Marketing*, Harry Beckwith wrote,

Don't value planning only for its results: The Plan.

The greatest value is in the process: The Thinking.²

Creative thinking in groups can lead to new ideas but can also confirm core values that drive your service and make it cost-effective. Whether your group's

thinking is out-of-the-box or in-the-box doesn't matter. What is important is that everyone has an opportunity to be heard, without prejudice, and feel that they have contributed to the organization's future success.

Creative thinking in groups will die a quick death unless everyone adheres to the following ground rules³:

- No negative reactions to suggestions are permitted.
- There is no such thing as a bad idea. Some ideas just work better than others.
- Listen in order to understand rather than to refute what the other person is saying.
- Rather than viewing differences of opinion as obstacles to overcome, try to view them as opportunities for you to learn about the viewpoints of other people.
- Encourage broad participation by bringing others into the discussion and by protecting minority points of view.

The Value of Teamwork

I'm sure you will agree when I say, "We were not all created from the same mold." In terms of our abilities as planners, some of us are thinkers and are most productive when we are generating ideas—but heaven help us when we have to put our ideas into practice. Some of us are doers and would rather get the job done immediately. Our motto is, "Just do it," and we often feel that doing something, even if it fails, is better than doing nothing. Then there are those who get so caught up in the process and the mechanics of planning that the thinking and the doing become secondary to the methodology. We need to have all of these types on board and working as a team for planning to become strategic.

Think of a group of people in various office buildings all looking down on what might or might not be a robbery on the street. Everyone is looking at the same scene, but they all see it from different perspectives and tend to interpret what they see through their own filtering system. What you see from your window is not only influenced by

the angle, height, light, shadows, and sound but also by who you are, how you were brought up, your cultural background, your education, and your life experiences. To paint a true picture of what is happening requires considering everyone's opinion and interpretation.

A major principal of strategic planning is that by participating in the process and taking responsibility for the objectives and action steps, employees are more likely to accept planning outcomes and take ownership of an institutional vision or departmental goal. That axiom pretty well speaks for itself.

Another equally important principal is that as organizations hire people with highly specialized skills in different fields, no one person in that organization has all the relevant knowledge and key information necessary to make a unilateral decision affecting the organization's future. It's generally far too complex an issue for one person.

For these two reasons alone it becomes vitally important to involve staff at all levels in the strategic planning process. This is the only way to ensure that the plan has considered all pertinent information, has measured all opinions, and has the buy-in of the whole organization. Yes, I realize it might be unrealistic to fully engage all employees in the strategic planning process, but it is not unrealistic to keep everyone informed, to seek everyone's opinion on crucial issues, or to solicit feedback on major roadblocks. It may take longer, but it is well worth the effort.

The Value of Flexibility

I would be remiss in not quoting Harry Beckwith again when he said, "Accept the limitations of planning."⁴ In my words, "You haven't chiseled the Ten Commandments on a stone tablet when you finalize your strategic plan." Circumstances can change quickly, and your organization needs the flexibility also to change quickly.

Consider the story of two competing railway companies around the turn of the 20th century. Both had a mission to "transport goods and people across the country by rail." As the automobile was invented and gave birth to the

transport truck, one of the companies changed its mission to “transporting goods and people across the country by any means possible”; the other stuck to the original mission. Which one do you think survived? As John Lennon once said, “Life is what happens while you are busy making plans.”⁵

Conclusion

It just wouldn’t be right to leave you without a dynamite conclusion that wraps everything up and brings some closure to this article. Well, here it is—I’ve saved the best for last. There is one all-important key to making your planning strategic, which, unless strictly adhered to, will negate everything I’ve said earlier.

The single most important catalyst in strategic planning is to *follow up*! Review the plan every six months to make sure it is still applicable and nothing substantive has changed. Review the action steps monthly. Hold people accountable for what they said they

would do. Don’t hide your strategic plan on a shelf. If possible, memorize your mission statement. Print your mission everywhere. Quote your mission often and answer the following questions on a yearly basis⁶:

- Does our mission/vision accurately describe our reason for being? Is it ultimately why we even exist?
- Will we as an organization or department be able to use our mission/vision statement to guide our budgeting process, both operating and capital?
- Will our strategic plan generate an eagerness among our employees to follow the plan and take personal ownership for ensuring its success?
- Does our strategic plan provide enough flexibility to adjust to abrupt changes in our business environment?
- Does our strategic plan appropriately utilize our strengths as an organization?
- Does our strategic plan concentrate our available resources on a specific goal or in a specific direction?

Now you’ve got it! Keep the process moving. Review, refresh, and renew your plan so that it continues to be strategic until your vision becomes a reality. *e*

Endnotes

1. D. D. McConkey, *How to Manage by Results* (New York: Amacom, 1983, p. 63).
2. H. Beckworth, *Selling the Invisible—A Field Guide to Modern Marketing* (New York: Warner Books, 1997).
3. “Creative Thinking Ground Rules,” adapted from *Team Building* (Toronto: Fromkin Van Horn Ltd., 1987).
4. Beckworth, op. cit.
5. Attributed to John Lennon (1940–1980).
6. Adapted from D. D. McConkey, *MBO for Nonprofit Organizations* (New York: Amacom, 1975).

Bart Strong (strongb@mcmaster.ca) is Executive Director (Administration, Classrooms) of the Learning Technologies Resource Centre, McMaster University, in Hamilton, Ontario, Canada.