

Strategic Planning Is A Messy Process

Gerri King, Ph.D.

Strategic Planning connotes an organized, step-by-step effort. It's true, but it's also quite messy because it's a change initiative. In fact, the only reason to have a strategy is to effect change and, whether it's negative or positive, all changes are stressful because with gains there are losses. We're giving up the familiar and heading toward the unknown.

Though often executed by the leadership team, if done correctly, the strategic planning process should include everyone at every level of the organization. (Remember, the people who do the job every day know how best to solve the problems.) Good assessments will provide the necessary information to move forward and, predictably, a lot of unexpected information will emerge - often derailing the original plan.

In the interest of moving fast, it's rare that the appropriate amount of time is allowed. The ideal is to spend a month in the pre-planning mode; 3 days for the leadership team and facilitator to create a framework from which to proceed; 6-12 months to assess, collect input, and create the plan; and 4-5 years for full implementation. Caution: do not even begin unless the senior leadership team is committed to seeing through from deployment to inclusion to implementation. Anything less will lead to cynicism among the employees and, ultimately, your external customers.

The following questions are pivotal to the process:

- Why should we change?
- What are our challenges?
- What data collection is needed and what will we do with it?
- What should be included in our action plan?
- Where are we now and where do we want to be?
- How will we get there?
- Who must do what?
- What are our opportunities and barriers?
- What are our strengths and weaknesses?
- What resources (financial and staff) are we willing to commit?

If responded to honestly, the conclusions can send the process into a myriad of unanticipated directions. Some respond to this as overwhelming and others as

exciting and adventurous. It is, indeed, an adventure and if approached as such, can unite and elevate the staff to levels not imagined.

Once immersed, it's not unusual for organizations to consider changing their mission and vision statements, business definitions, values commitments, internal and external customer service approaches, and strategic philosophy. Solving some problems may create others. It's sometimes difficult to keep the energy high but so worth it to keep going.

The usual reasons for plans failing include a lack of leadership commitment, turf-protection, cultural malaise and inertia, reluctance to allow the time to engage, inadequate information, and not listening to input from all employees.

The keys to successful implementation are:

1. Turning priority issues into measurable action plans.
2. Realignment of the organization with the new objectives.
3. Encouraging accountability without blame or punitive response.
4. Using teams appropriately.
5. Willingness to fix core processes and systems. *The 2 major reasons for conflict in organizations are role confusion and lack of clear process.*
6. Skills alignment or more training to make that happen.
7. Regular review and reassessment of the plan.

Strategic Planning is geared toward the fundamental ways that you will conduct business in the future and how you will achieve those objectives. It's a change process that determines your future so you can become what you want to be. It requires the allocation or reallocation of resources. Of course, you want success to be measurable. And finally, it requires buy-in and trust from the entire staff.

After discovering how much on-going effort is required, the response is often "That's not what we signed up for. We just want a clean, well organized strategic plan that works." Wanting it to work is the pivotal point. It can't work without the buy-in of your employees. And, now we've uncovered the major reason for it appearing "messy." People. Emotions, fears, confusion, and uncertainty are brought to the surface. We are no longer on the logical/objective side of the brain. It is the moment when discouragement sets in and the process risks being stopped or short-changed.

But, when the above is embraced and seen as a challenge worth addressing, you are likely to emerge with a successful strategic plan to which people can

commit. The by-product is the coalescing of teams, cross-functional commitment, and a generally happier workforce that feels included and valued. So, the good news is, “Strategic Planning Is A Messy Process” that results in a well-thought out agenda for a successful future. And, if you think you don’t have time to do it, ask yourself if you have time not to because it is far better to be in a proactive position than reactive. A well thought out and executed strategic plan is your insurance policy.

Gerri King, Ph.D., is a social psychologist and organizational consultant who trains and facilitates throughout the US and abroad