



CRITICAL SUCCESS FACTORS IN STRATEGIC PLANNING

Strategic planning can send a chill through the soul of even the toughest professional. Visions of hollow conference rooms, sheets of blank white paper, droning facilitators, and corny 'team building' games. Worst of all, the dull fear that perhaps despite our best efforts, we won't actually use any of what has been created to advance our mission, financial growth, or capacity to serve.

Strategic planning does not have to be this way. In fact, it should be the opposite of that horrid experience and, if done correctly, will instill optimism, elation, and excitement in the participants. But how do we achieve that reality? What is essential and how do we facilitate the type of planning process that brings evidentiary and qualitative change?

Strategic - of great importance within an integrated whole.

Imperatives - critical actions demanded of us.

The Purpose:

The purpose of strategic planning is to transform an organization by identifying Strategic Imperatives and then creating a plan to advance key performance indicators for success.

A well run strategic planning process should help you to:

- Create a vision for your organization's future
- Provide a roadmap for governance leaders
- Provide a framework and a focus for improvement efforts
- Optimize organizational systems and resources
- Provide guidance for day-to-day decisions
- Build a "critical mass"
- Provide a means for assessing progress
- Structure a funding model for necessary growth investments

To accomplish this requires a comprehensive, scientifically based assessment of what is and has been real in the organization - fact not opinion. It also requires an inclusive approach to strategy discussion; an abandonment of cynical thinking and perception; and freedom to develop creative reactions to the discovery and findings of the team.



Critical Success Factors:

Here are 5 Critical Success Factors to facilitating and developing effective and efficient strategy planning.

1. **Divide and conquer.** The strategic planning team you pull together to develop the 60,000 foot view of the issues, is the same team that will develop the imperatives. But this is not the same team that will creatively define the actions to achieve the outcomes. Keeping these two groups separate is essential to eliminating mission and strategy “spread”- the hijacking of the process by certain strategic planning participants who want to dive deep into tactics, all while the group is trying to maintain altitude and discuss vision and reasons for being.

Forming a Strategic Imperatives Committee, to handle the mission, vision, charge, and development of the Strategic Imperatives; and separately a Strategic Action Committee, to handle the creation and development of the activities to achieve those imperatives, lends itself to natural boundaries. Capturing the thoughts -in a parking lot - of the deep divers, the ones pulling the team into the weeds of tactics, allows those tactical practitioners to be heard and gets their useful ideas into a more focused and productive forum where they can be incorporated more...well, strategically.

2. **Inclusive, rather than exclusive, participation.** Abandon the “senior staff only” model of corporate strategic planning and invite a broad cross section of your organizations field workers, advisors, volunteers, board, donors, members, clients and administrative team. Encourage and empower those team members not accustomed to sharing their thoughts, experiences and observations, by making your strategic planning area a judgment free zone. This may require NOT inviting certain senior level staff who may inhibit dialogue and authentic communication- you know who they are. Include those who were ‘left out’ in a later summit, where you’ll share the results and outcomes of the strategy session and you’ll be encouraging their feedback, which of course you will find a way to use.

3. **Fact over fiction.** Corporate perception often drives companies to their grave. Without accurate and objective understanding of core challenges and strengths, a strategic plan is not relevant to the actual company it is intended on leading. It becomes a ghost document that is leading a judgment and not a reality. For many companies, gaining that perspective requires moving far enough back to see the facts. This can be challenging and there are groups who would benefit from hiring a consulting firm to facilitate the audit and assessment component of their strategic planning work. Asking the questions that seem obvious, and not accepting the first answers as fact, is a critical factor in obtaining true perspective in your strategy development.

Think critically.



4. **Supporting your efforts with sufficient resources.** A conference room, some white boards, a box of doughnuts, and coffee do not a strategic planning process make. Your planning begins long before your groups are assembled. Preparations include audit and assessment of your existing state of being, aggregation of assessment findings, dissemination and digestion of results, affirmation of accurate conclusions, as well as the development of planning agenda's that work. All of this require time, talent, and money. Make sure this is not a back of the napkin effort and you will be rewarded for your investment with results that are productive and filled with opportunity. Assign a budget, a timeframe, and people responsible for tasks and action steps in developing your strategy.

5. **Post planning strategy.** Strategic planning does not end at 4PM with a round of applause and a ream of notes. Although it will feel good to finish, it's only the beginning. Work into your planning a process review of the expected outcomes with key stakeholders and practitioners, who will execute on tactics. Also establish timeframes for key accomplishments, benchmarks, and identify accountability personnel. Develop a series of future meetings to touch base as a strategic planning group, measuring progress and making iterations to the plan. Don't finish two yards short of the goal post- complete the effort.

Help when needed.

Not all companies and organizations are staffed effectively to manage the development of Strategic Imperatives and Strategic Actions on their own. In these cases, having a consultant lead your group will provide you with the best outcomes and ROI for your efforts.