

Ask An Expert: How to Ace Strategic Planning



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When I was hired to lead a team on the verge of collapse in the mid-nineties, I learned the hard way that having a strategy is not only smart, but necessary. Since then I've discovered that the strategic planning process is pretty straightforward—you must be clear about where you want to go, know what you want to be different once you get there, and have the right plan and partnerships to help get you there. However, your *approach* to strategic planning is what determines how painful it is (or not), how fruitful the process is (or not), and ultimately how successful your outcomes are (or not).

Originally used for military in the art of war, the word strategy signified the thinking and decision-making process for mapping out a plan to get the greatest advantage over the enemy. In our world, our biggest enemies may be ambiguity, lack of vision, and insufficient buy-in for the goal. To combat these enemies, I designed The Road to “There,” a simple and engaging strategic planning process that inspires collaboration, creative thinking, and a forward focus. The five strategies below are guiding principles for my process, and I trust they can be successfully adapted and applied to yours. [READ MORE]

Begin with the end in mind.

Strategic planning boils down to planning with a specific end in sight and then plotting the steps needed to reach your goal. Whether working with a group or flying solo, start the process by letting yourself dream big. Indulge in an idealized post-project world—and that will give you focus and clarity about what it will take to get there.

According to Steven Covey, one habit of highly effective people is that they “begin with the end in mind.” This maxim also applies to strategic planning. In my Road to “There” process, the first step is identifying what “there” will look like. Even when you’re strategizing on your own, it’s essential to take the time to envision how things will be different.

It’s also essential that your “end in mind” is clear when you invite others to participate in the process. Before each strategy meeting or information request, have clear intentions about why you’re calling upon that carefully chosen group of people and what you hope to learn from them or accomplish with them. You must always be able to answer “why,” or your employees may see their part in the process as an exercise in futility.

Always ask “what if?”

What I love about strategic planning is the opportunity to stand on the proverbial high mountain, look down, see the big picture, and discover all the possibilities. In reality, though, I know it can be difficult to see past our usual routines, habits, and workplace norms, and perceive all the options and opportunities that exist. One way to combat this is to dedicate some time and energy to “what if?”

With a previous team I worked with, staff members were tired, burnt out, and felt they had no power, so I held a “what if” retreat. What if we had all the money, staffing, and resources we needed? What if we had that new systems software? What if we had more space? And so on. The more people talked, the more excited they became. About halfway through the retreat we reviewed our “what ifs” and realized they weren’t all that outlandish. We narrowed the list down to about half a dozen items that—although a stretch—we hoped we could pull off. Inspired and energized, the team really went for it, and they managed to accomplish everything on that list (and then some).

If strategizing on your own, ask yourself what you would do if you were *them*—your boss or another higher-level leader in your organization. If you had greater power and authority, what would you give yourself? What would you do for yourself and your team? How would you change the current situation or environment?

“What if” encourages people to start thinking outside the walls. “What if” takes “they won’t let us” or “we can’t because...” off the table. It breaks people out of their constraints and disrupts any possible victim mentality or defeatist attitude.

Engage people at all levels.

Who you involve in your strategic planning process will depend upon your objective, its complexity, and its scope. If you’re overseeing a three-year organizational initiative, you may need to bring together your department’s management team, various stakeholders, or the entire staff at various points in the process.

Of course, it’s not practical or appropriate to include every staff member in every planning process—but everyone needs to be connected to your strategic plan. Too often, leaders believe that their job is to communicate what needs to get done. In some sense that is true, but if you simply assign tasks and projects without revealing your overarching vision, how can your employees determine the best way to approach the work at hand?

If you want to engage the best creativity, productivity, energy, and thinking, you must involve people in your strategy.

Don’t let words get in the way.

Brainstorming is key to strategic planning because strategic planning is all about ideas, and the freedom and spontaneity of true brainstorming helps break us out of our usual ways of thinking and sparks innovation and creativity. But not all brainstorming methods are equal.

In my early years of facilitating The Road to “There,” I conducted brainstorming as many of us do with groups—people would throw out ideas and I would capture them on flip chart paper.

Even though we had ground rules about not criticizing during brainstorming, some people couldn’t help but speak up. We’ve all been in meetings or retreats that turn into grueling wordsmithing sessions or semantic discussions; the loudest people often get their way and others feel defeated and give up. Even worse, with teams that are dysfunctional and have resentment or conflicts simmering under the surface, this kind of brainstorming can be as dangerous as lighting a match in a barn full of hay.

I researched other brainstorming methods and decided to use affinity diagramming as a model. This brainstorming process involves each person—anonymously—writing their ideas on sticky notes. The sticky notes are then collected and posted, at which point the group begins organizing them and identifying themes or categories. This approach lets each person contribute, unfiltered and unfettered, but then brings the whole group together to examine the ideas and their applications.

If you’re strategizing on your own, you will need to turn off your internal editor or critic during the initial brainstorming part of your planning. Let the words and ideas flow! No one else will see them, and you can refine them later if needed.

Get out of the way.

As mentioned earlier, you should have clear intentions about why you’re involving certain people and what you hope to learn from them or accomplish with them—but you also need to know when to step back and get out of their way.

With one of my Road to “There” facilitations, an incredible “aha” moment occurred when the team was envisioning what “there” could look like. Until then, the chair hadn’t realized what his team aspired to—and never would have asked them to shoot so high. By giving his team free rein to imagine possibilities, a whole new world of options opened up. Further, by inviting all of his employees to engage in this process, he saw clinicians, faculty, and staff truly working together as a team.

With another group, the visioning part of the process wasn’t that far outside the box, but when they began to talk about the mechanisms—the things they could do to move them from their current state to a better place—a transformation occurred. People who weren’t in leadership roles and had never shown an interest in leading began volunteering to champion various tasks and aspects. Because the leader stayed out of the way and didn’t try to take control of who did what, excitement and engagement built throughout the process and new leaders were born.

In conclusion, keep in mind that people don’t like to follow leaders who don’t know where they’re going. In any strategic planning process, begin with the end—your vision, the desired future state—and let that carry you and your team forward.