

Member's Quarterly

Fall 2018 Edition

Feature

Leading the Strategic Planning Process: Back to the Basics

Build a solid foundation

Leading a strategic planning process can be daunting for anyone. If you're leading one for the first time, it may also seem overwhelming. The work is complex, there are often many participants and a lot can be at stake. There are also many choices to consider along the way. But when you strip any strategic planning process down to its core, you'll see it's based on these three fundamental questions you must answer:



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Step One: Where are we now?

Establishing a clear view of your current state is an essential first step in a strategic planning process. By focussing on 'where are we now?' you create the space for a thoughtful, comprehensive and appropriately critical examination of your current situation. This should include hard data and objective sources of information (including relevant research), as well as more subjective insights and perspectives. A SWOT analysis (exploring and assessing strengths, weaknesses, opportunities and threats) can be a useful way to build shared understanding about your current reality. When strategic planning teams go through this exercise, they are better able to clarify priorities and focus their planning efforts on areas that matter the most.

Look at how you are doing relative to your goals and expectations through to how the organization is faring within its sector and compared to appropriate industry benchmarks. You can then ensure that everyone is able to gain a sense of what the facts and data tell you — immediately shifting the conversation to evidence-based considerations rather than opinion.

Step Two: Where do we want to be?

Answering this question is about envisioning a desired future state — one that requires a stretch. In fact, some of the best visions may never be achieved. Instead, they serve as clear but distant beacons against which the organization can set its course and measure its progress.

Visioning work to explore desired future states benefits from thoughtful engagement with employees, customers and stakeholders. Give everyone time and inspiration to dream about imagining what is desired, needed or possible now. Tapping into sources of inspiration from inside and outside your sector can be very beneficial, along with exercises that help team members shift out of status quo thinking. A good example is an exercise that invites everyone to imagine and describe what may lead to receiving a major industry award in five years' time. By using a concrete scenario to imagine an appealing future state, the team can be creative in exploring fresh possibilities.

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Solid visioning work will often begin to point the way towards possible strategic directions and what each will require, as well as what might be standing in the way. It will also allow the team to arrive at a shared understanding about questions such as these: What is it about the desired vision and possible strategic directions that will energize the organization? What directions respond most meaningfully to evolving customer and/or stakeholder needs and expectations? What will allow the organization to best address an acute economic development (positive or negative) or a pending regulatory change? What ideas about possible ways forward are beginning to emerge?

Step Three: How will we get there?

Once your desired future state and the most promising strategies to be pursued are defined, it's time to move into the essential work of goal setting and action planning. Whatever your approach, ensure your goals are smart goals and action plans are sufficiently detailed to lead to action you can measure. Anything less will contribute to a plan that runs the risk of collecting dust on a shelf. Also at this stage, expect to drop some things or reconsider your timelines. You should be stretching but you need to be realistic too.

If you're not familiar with SMART goals, take a moment to get comfortable with the concept: Specific, Measurable, Actionable, Realistic and Timed. Take your SMART goals one step further with detailed action planning and implementation follows. By assigning start and end dates, accountabilities and measures of success (progress indicators as well as goal completion), you will build a solid framework for success – a plan that gets implemented and allows your organization to move towards its desired future state.

Your own approach to strategic planning will always need to be informed by the context and circumstance of your organization and the sector in which you operate, as well as the full scope of your planning mandate and the resources available to you. There's something to be said for building with the basics in mind. Ask yourself the three fundamental questions and you will continually be well served.

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