



## A Strategic Planning Retrospective

As we celebrate our 30<sup>th</sup> year in business, a retrospective on strategic planning is in order. Over three decades, our firm has designed and facilitated strategic planning engagements with clients across the federal government, for profit, and not for profit sectors.

We have observed and experienced aspects of planning which remain constant, as well as variables which influence the planning process and final product.

### The Constants

- The importance of understanding and accounting for trends in the global and sector specific environment remains an essential pre-plan development exercise.
- Recognizing and assessing the past plan to build on successes and address shortfalls is a critical launch point for a new plan.
- Meaningful engagement of internal and external stakeholders is a centerpiece step.
- The numbers of participants engaged in the planning process tends to drive the length of time to produce a final plan and more involvement generally broadens the focus of the final product.
- The extent to which top leadership engages in the plan formulation and demonstrates the importance of the plan is directly tied to the plan's relevance and value to the rest of the organization.
- The need to be ready and willing to adapt and change the plan based on changing conditions and priorities has become more important over time.
- Strategic planning is a decision process, and most organizations struggle to agree on what *not* to do more than what they *should* do.

### The Variables

- The uses of strategic plans vary greatly across client systems. This variation most directly links to the leader's style, organizational culture, and intended audiences.
- The length and level of detail in a plan is directly tied to the how the plan will be used. For example, a high-level and visionary document to convey strategic direction, and/or a plan to drive specific resource decisions and manage performance.
- The extent to which measurability is desired and built into the strategy is highly varied and tends to be linked with need for performance accountability by higher levels of the organization or Boards.
- The effectiveness of plan execution tends to be linked to the level of resources dedicated to the "care and feeding" of the system.

### The "Take-Away"

Our retrospective over 30 years affirms our belief that strategic planning is NOT a cookie cutter process where "one size fits all". It is as different as each of the organization's leaders, cultures, and environment and should be customized to align with the intentions of each. The depth, breadth and length of the plan and planning process tie directly to a plan's purpose – who needs to be engaged, the desired audience, and management application.

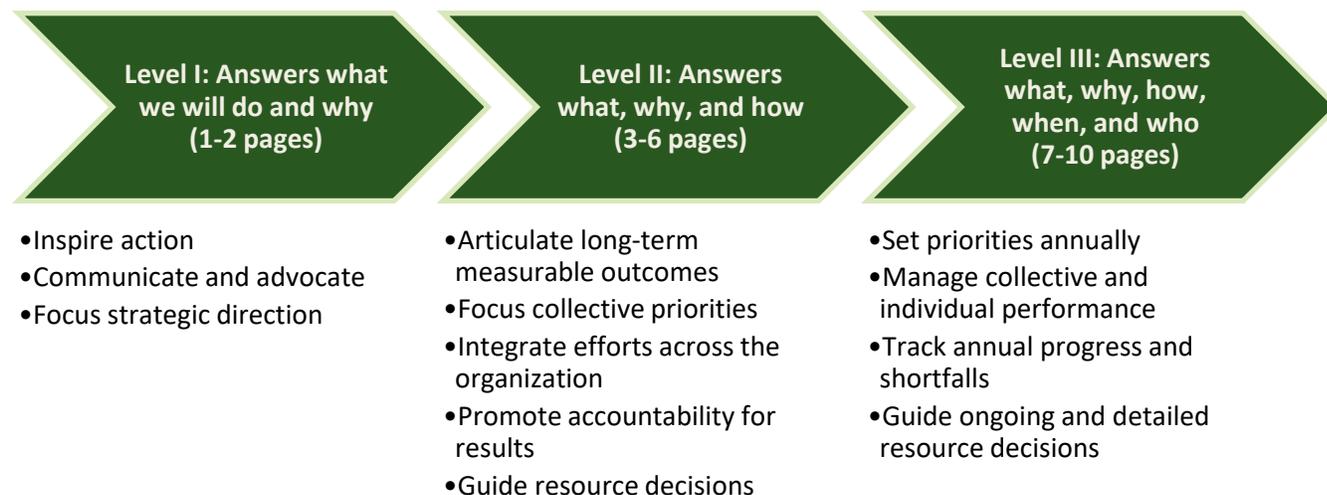
## Considerations

Before undertaking a strategic planning effort, the top leadership team should engage in honest dialog to agree on:

1. Why do we want a strategic plan? (E.g. required by a higher level; a communications tool; to inspire the workforce; as a mechanism for engaging and collaborating with stakeholders; a framework for setting direction and priorities; a guidepost for allocating resources; a way to measure and manage performance; all of the above?)
2. Who is/are our audience(s)?
3. How will we *honestly* use the plan once it is formulated? (E.g. as an “elevator speech”; a means of focusing organizational direction and future strategic decisions; a means of connecting high-level strategies to daily operations and managing performance; some combination or another driver?)
4. What energizes us about strategic planning? What do we dread?
5. What is our timeframe for development and execution?
6. Who needs to be engaged, involved, and ultimately part of the decision process?
7. What resources are available to support the formulation?
8. Do we need a plan execution process? How will it be implemented and supported?

## Levels of Plans and How They Might Be Used

As you move across the continuum, the benefits of each previous level are subsumed:



## Conclusion

At its core, strategic planning can be a valuable leadership and management tool. It stimulates long-term thinking, promotes challenging assumptions, and focuses its members around a shared understanding and agreement on the way forward. It is a tool for decision making on strategic direction, focused priorities, and in turn informs competing resource decisions.

The punchline is that if a strategic plan is to be valuable and useful post development, the implementation must align well with the leader’s style, the organization’s culture, and intended uses for the plan.